Alberta
Learning

Funding Manual for School Authorities 2003-2004 School Year

For School Jurisdictions,
Charter Schools,
Funded Private Schools and
Private ECS Operators, with
Students in grades 1 to 12 and/or
Children in Early Childhood
Services (ECS)

103-07373/

ALBERTA
LEARNING

Office of the Minister

Message from the Minister

I am pleased to provide you with Alberta Learning's Funding Manual for School Authorities – School Jurisdictions and Charter Schools for the 2003-2004 school year. Included is a Summary of Significant Changes for 2003-2004.

The manual provides details on the funding available for 2003-2004, funding criteria, requirements and procedures that apply to funding, and the funding rates.

I have authorized this Funding Manual for School Authorities for use by school jurisdictions to access Alberta Learning funding. This funding is for the provision of approved education programs for students in grades 1 to 12 and ECS children.

I encourage you to review the manual, noting the changes and revisions indicated by the notations "New" and "Revised". Additionally, for school jurisdictions, the 2003-2004 school year is the transition year to begin the implementation of the renewed Funding Framework. Part 1 of the manual has been reorganized and reformatted with significant changes to the content. The Summary of Significant Changes outlines these changes.

Any questions or comments may be directed to the appropriate contact listed on pages 3 and 4 of the Introduction section.

Best wishes for a successful 2003-2004 school year.

Sincerely,

Dr. Lyle Oberg
Minister of Learning

204 Legislature Building, Edmonton, Alberta, Canada T5K 2B6 Telephone 780/427-2025 Fax 780/427-5582

Printed on recycled paper

ALBERTA
LEARNING

Office of the Minister

Message from the Minister

I am pleased to provide you with Alberta Learning's Funding Manual for School Authorities – Private ECS Operators and Funded Private Schools for the 2003-2004 school year. Included is a Summary of Significant Changes for 2003-2004.

The manual provides details on the funding available for 2003-2004, funding criteria, requirements and procedures that apply to funding, and the funding rates.

I have authorized this funding manual for use by private schools, and private Early Childhood Services (ECS) operators to access Alberta Learning funding. This funding is for the provision of approved education programs for students in grades 1 to 12 and ECS children.

Any questions or comments may be directed to the appropriate contact listed on pages 3 and 4 of the Introduction section.

Best wishes for a successful 2003-2004 school year.

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FUNDING MANUAL
FOR SCHOOL AUTHORITIES
2003/2004
SCHOOL YEAR

This manual is issued under authority of the following:

- *School Act*, RSA 2000, Section 176
- *Alberta School Foundation Fund Regulation* (AR 250/96, amended by AR 166/2001)
- *Government Organization Act*, Section 13
- *Learning Grants Regulation* (A.R.77/2003)

Authorized By
Minister of Learning

July 29, 2003
Date

SUMMARY OF SIGNIFICANT CHANGES FOR 2003-2004
FUNDING MANUAL FOR SCHOOL AUTHORITIES
FOR THE 2003-2004 SCHOOL YEAR

The following outlines the significant changes to the manual, including those relating to the renewed Funding Framework.

1. PART 1 begins with a section entitled Renewed Framework for Funding School Jurisdictions. It explains the Principles and the Flexibility, Accountability, and Funding Pillars of the renewed Funding Framework. The Flexibility and Accountability Pillars are being implemented in the 2003-2004 school year. Accountability measures are included in the explanation of the Accountability Pillar. These measures will be used in assessing and reporting results. School jurisdictions have the flexibility needed to accommodate local decision-making and are publicly accountable for the use of resources and for results achieved.

2. ECS funding for school jurisdictions described in PART 2 of previous funding manuals has been moved to PART 1 of this manual.

3. In PART 1 the funding categories are divided as Base Funding and Differential Cost Funding. Base Funding deals with base cost of operations and Differential Cost Funding deals with cost factors that are beyond the control of the board and vary across jurisdictions.

4. PART 1 FORMAT CHANGES:
   The sections in PART 1, Funding for School Jurisdictions, have been reformatted to assist in providing maximum flexibility to school boards. The Purpose statement has been removed and the Conditions, Requirements and Considerations have been replaced by the following:

- ALLOCATION FORMULA: states the formulas that determine the amount of funding for which a school jurisdiction is eligible.

- ALLOCATION CRITERIA: describes the necessary conditions under which the funding is provided, for example, what senior high school credits are eligible for funding; eligible student counts for specific programs; how to determine the number of full-time and the number of part-time grade 10 students eligible for funding.

- PROCEDURES, DOCUMENTATION AND REPORTING: describes what procedures to follow for submitting student counts; what coding to use for specific student counts; what forms are used for specified funding; what documentation school jurisdictions are to keep on file (transportation bus routes and maps) and special reporting requirements.

- ADDITIONAL INFORMATION: other information that is useful to school jurisdictions relative to funding, for example, fee deductions for Edulink and the Alberta School Boards Association and students transfers between school authorities and the effect on funding.

5. Education program requirements that are described in Alberta Learning documents, for example, the *Guide to Education: ECS to Grade 12* and the *Standards for Special Education*, have been removed from Part 1 of the Funding Manual. However, these documents are to be used in conjunction with the Funding Manual in determining the education program requirements and standards for which funding is provided.

6. References to expenditure reporting in the Audited Financial Statements have been removed from Part 1 of the Funding Manual. The reporting requirements will be outlined in the documentation accompanying the Audited Financial Statement.

7. PART 2 describes Early Childhood Services funding for private ECS operators and funded private schools.

8. PART 4 includes Francisation (previously in PART 1) as this program is funded by the Federal Government and is now together with other federally funded programs.

9. PARTS 5 and 6, Other Provincial Funding and Services Contracted by Government includes funding such as the Student Health Initiative, and programs under contract, such as Institutional Programs. These programs remain unchanged for the 2003-2004 school year.

10. Basic Instruction, sections 1.2 and 3.1, have been revised to bring the minimum course completion requirements for the funding of CEUs earned in grade 10 regular courses into alignment with the grades 11 and 12 minimum course completion requirements for funding. A student must now earn a final mark of at least 25% (but less than 50%) in the grade 10 course, and have attended at least 50% of the classes in the course or have worked on and been assessed for at least 50% of the course content. In the 2002-2003 school year, a grade 10 regular course was funded if an earned mark was at least 25%.

11. Basic Instruction, section 1.2, includes the requirement that the Chairman, Superintendent and Secretary-Treasurer sign a Declaration of the School Board and Management certifying that the Credit Enrolment Units submitted are complete, accurate and do not contravene the funding guidelines for CEU funding as outlined in the Funding Manual. The declaration will be included in RACERS and should be printed, signed and submitted to School Finance.

12. Section 1.9, Funding in Transition, includes seven funding areas from the 2002-2003 school year that have been combined for 2003-2004 but the same formulas (2002-2003) are used to calculate funding. This funding will be rolled into new formulas with the implementation of the Funding pillar.

13. New one-time funding for Resources for the Classroom (sections 1.15 and 3.7) is included for school jurisdictions and private schools.

14. Enhanced Opportunity funding (section 1.12) and Program Enhancement Project funding (sections 1.6 and 2.4) for school jurisdictions and private ECS operators have been extended for one more year. New applications for the 2003-2004 school year will not be accepted.

15. The Regional Assessment Services name has changed to Regional Educational Consulting Services (section 6.2). The rate charged for consulting services has increased from $35 to $45 per hour to recognize the increased costs of providing these services.

16. The holdback in Program Unit Funding (section 2.5) for private ECS operators has been reduced from 20% to 10%. This reduction recognizes that operators are using the majority of their approved budgets and that the 20% was causing some financial difficulties for private ECS operators.

17. School jurisdictions are asked to retain transportation data in electronic form for a minimum of three years as described in PART 1, sections 1.17 1.18, 1.19 and 1.20, and on request submit the data either electronically or on a computer disc to School Reporting.

SUMMARY OF SIGNIFICANT CHANGES FOR 2003-2004
FUNDING MANUAL FOR SCHOOL AUTHORITIES
PRIVATE ECS OPERATORS AND FUNDED PRIVATE SCHOOLS
FOR THE 2003-2004 SCHOOL YEAR

The following outlines the significant changes to the manual.

1. PART 2 describes Early Childhood Services funding for private ECS operators and funded private schools.

2. PARTS 5 and 6, Other Provincial Funding and Services Contracted by Government includes funding such as the Student Health Initiative, and programs under contract, such as Institutional Programs. These programs remain unchanged for the 2003-2004 school year.

3. Basic Instruction, sections 1.2 and 3.1, have been revised to bring the minimum course completion requirements for the funding of CEUs earned in grade 10 regular courses into alignment with the grades 11 and 12 minimum course completion requirements for funding. A student must now earn a final mark of at least 25% (but less than 50%) in the grade 10 course, and have attended at least 50% of the classes in the course or have worked on and been assessed for at least 50% of the course content. In the 2002-2003 school year, a grade 10 regular course was funded if an earned mark was at least 25%.

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2003 – 2004
FUNDING MANUAL
FOR SCHOOL
AUTHORITIES

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Website: http://www.infras.gov.ab.ca/Content/doctype206/production/sccamanual.htm

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Revised

The public education system faces many challenges and opportunities. To assist **school jurisdictions** to meet these challenges and opportunities, a funding allocation model has been developed that provides greater flexibility to achieve the desired outcomes. This renewed Funding Framework provides a means to allocate funds to **school jurisdictions** to provide a quality education reflecting the needs of students and society. It is an allocation system that distributes funds equitably, provides maximum flexibility to accommodate local decision-making and requires public accountability for the use of resources and the results achieved.

The framework for funding private schools and private ECS operators continues with the same structure in place as for the 2002 – 2003 school year.

This Manual explains how the funding is made available to **school authorities** and how it can be obtained. The information in this Manual is not intended as a substitute for the Provincial statutes, or regulations or for specific instructions, or explanatory material issued by various branches of Alberta Learning.

The Funding Manual for School Authorities is released by Alberta Learning for the use of central office administrators, school administrators and other parties involved in the funding of ECS to grade 12 education. It will assist **school jurisdictions, Francophone regional authorities**, **charter schools**, **private ECS operators** and **funded private schools** in accessing funding from Alberta Learning.

Section Format

The formats for each section of the manual describing the funding that is available to **school authorities** are as follows:

New

PART 1: School Jurisdictions

ALLOCATION FORMULA: states the formula used to determine the amount of funding.

ALLOCATION CRITERIA: describes the criteria under which the funding is provided.

PROCEDURES, DOCUMENTATION AND REPORTING: what procedures/documents/ reporting that **school jurisdictions** must follow/maintain/provide in order to access funding.

ADDITIONAL INFORMATION: other information useful to **school jurisdictions**.

REFERENCES: other documents that should be used in conjunction with this Funding Manual.

PARTS 2 – 7: **School Authorities**

PURPOSE: a short statement describing the intent of the funding.

CONDITIONS: the conditions under which the funding is provided.

REQUIREMENTS: what school authorities must do to receive funding.

CONSIDERATIONS: other information useful to school authorities

REFERENCES: other documents that should be used in conjunction with the Funding Manual.

Information Required for Funding

Some funding is provided on the basis of student information that school authorities have reported directly to Information Services. Some funding may also be dependent upon **school authorities** submitting a form to School Finance. All forms referred to in the Manual can be found in the FORMS section of the Manual.

Glossary of Terms

The Glossary of Terms outlines the definitions of terms used in the Manual. Each term is printed in **bold face type** throughout the Manual and has a specific meaning for funding purposes.

Identification of Content Changes

Revised

Users are encouraged to familiarize themselves with this document in its entirety. Changes are identified in each section with the terms "New: and "Revised". A list of major changes is provided in the accompanying document: *Summary of Significant Changes for 2003-2004.*

Revised

CONTACT ALBERTA LEARNING FOR ASSISTANCE

While Alberta Learning has made every effort to make the Manual clear and understandable, **school authorities** may require further information. To contact Alberta Learning, please refer to the following list of contacts. For calls outside of Edmonton, dial 310-0000 then dial the area code and number of the contact.

BRANCH	CONTACT	PHONE #
School Finance	Wayne Braun Kenneth Poon Jeff Willan Mark Lalumiere	780-427-2055 780-427-2147 (FAX)
School Reporting	Dale Fulford	780-427-2055
Budget and Fiscal Analysis	Gene Williams	780-427-2055
Special Programs	Rick Hayes	780-422-6326
	Lorraine Stewart	" " "
	Ron Taylor (Calgary)	403-297-5021
Information Services (IS)	Help Desk	780-427-1111
Field Services		
Zone 1	Terry Wendel	780-427-5394
Zone 2 and 3	Michael Walter	780-427-9296
Zone 4	Loraine Steele	780-427-5381
Zone 5	Merla Bolender	780-415-9312
Zone 6	David Woloshyn	780-427-5377
French Language Services	Debby Johnston	780-427-2940
Aboriginal Services	Morris Manyfingers	780-415-9300
Governance and Program Delivery	Valerie Keates	780-427-7235
School Improvement	Vacant	780-427-3160
Alberta Children and Youth Initiative	Sandi Roberts	780-422-9423
	Pat Cox	" " "

BRANCH	CONTACT	PHONE #
Alberta Infrastructure - Learning Facilities Branch		
NORTH –	Larry Wilson	780-422-0768
CENTRAL –	Doug Ramsey	780-422-0623
SOUTH –	Mike Irving	403-297-4563
POLICY, FINANCE, AND INFORMATION SERVICES	Hilary Rose	780-427-2167

The individuals named above may be contacted by e-mail by typing their first name, (.) dot, last name followed by @gov.ab.ca, (e.g., Wayne.Braun@gov.ab.ca).

The 2003-2004 Funding Manual for School Authorities is available for viewing and printing on Alberta Learning's website at http://ednet.edc.gov.ab.ca/funding/FundingManual/

Funding application forms should be submitted to the School Finance Branch at:

Alberta Learning
School Finance Branch
8th Floor, Commerce Place
10155 - 102 Street
Edmonton, Alberta
T5J 4L5

DOCUMENTS:

Funding Manual for School Authorities 2003 – 2004	available from the Alberta Learning website – http://ednet.edc.gov.ab.ca/funding/FundingManual/
Guide to Education ECS to Grade 12 (2003)	available from the Alberta Learning website - www.learning.gov.ab.ca. Click on Kindergarten to Grade 12, then under Legislation, Regulations and Policies.
Guide to School Authority (School Board, Charter School, Private School) Planning and Results Reporting	available from the Alberta Learning website - www.learning.gov.ab.ca. Click on Kindergarten to Grade 12, then on, Information for Administrators select Planning Resources for School Jurisdictions
Advisory Manual on Early Childhood Service for Incorporated Non-Profit Societies and Private Schools	available from the Alberta Learning website - www.learning.gov.ab.ca. Contact: Zone Branches – see Contacts for Assistance section of the Introduction.
Policy, Regulations and Forms Manual	available from the Alberta Learning website - www.learning.gov.ab.ca. To access the manual, click on *Kindergarten to Grade 12 Education* then click on *Legislation, Regulation and Policies.*
Private Schools Reference Manual (2002)	available from the Alberta Learning website - www.learning.gov.ab.ca.
Charter School Handbook	contact: Special Programs Branch (780) 422-6326
Kindergarten Program Statement	contact: Curriculum Branch (780) 427-2984 (780) 422-0624 Jenny Bushrod
ECS Program Unit Funding: A Handbook for ECS Operators	contact: Special Programs Branch (780) 422-6326
Student Health Partnership Service Plan Guidelines for 2003/2004	contact: Alberta Children and Youth Initiative (780) 422-9423

School Capital Funding Manual	-	Available on the Alberta Infrastructure Website - http://www.infras.gov.ab.ca/Content/doctype383 /production/school capital manual 2002-03.pdf
	-	contact: Alberta Infrastructure Learning Facilities Branch (780) 427-7924
Standards for Special Education	-	contact: Special Programs Branch (780) 422-6326
First Nations, Metis, and Inuit Education Program Guide	-	contact: Aboriginal Services Branch (780) 415-9300
Handbook for the Identification and Review of Students with Severe Disabilities	-	available on the Alberta Learning website http://www.learning.gov.ab.ca/k_12/specialneeds /Identificationhandbook.pdf
Special Education Definitions 2002/2003	-	available on the Alberta Learning website http://www.learning.gov.ab.ca/k_12/ specialneeds/specialed_def.pdf

For copies of “Alberta Statutes” referenced in this manual, contact:

Queen’s Printer Bookstore
Main Floor, Park Plaza
10611 – 98 Avenue
Edmonton, Alberta
T5K 2P7
(780) 427-4952

OR

Queen’s Printer Bookstore
John J. Bowlen Building
602 – 6207 7th Avenue S.W.
Calgary, Alberta
T2P 0Y8
(403) 297-6251

OR

For on-line access to the Statutes use <http://www.qp.gov.ab.ca>

For out of town calls, please dial (310-0000) to be connected toll free to any of the above numbers.

Revised

Many of the prerequisite conditions that were in the former funding manual for **school jurisdictions** (Part 1) to receive funding have been removed to allow **school jurisdictions** increased flexibility to make spending decisions that best meet the needs of all their students and their local programs and priorities. The conditions and requirements in Parts 2 – 7 remain the same in this manual as they were in the previous manual, except for necessary revisions.

General terms and conditions are listed below. The Manual user should become familiar with these and ensure that they are met.

1. Unless otherwise specified, funding is for the current school year using the payment schedule and funding rates indicated in Part 7.

2. The **Minister** may determine the funding amount and the method by which that amount is determined. This determination may include a reduction in funding where a strike or lockout leads to cessation of services by teachers or other employees of a **school jurisdiction**, **charter school**, **private ECS operator**, or **funded private school**.

Revised

3. Funding is provided to **school authorities** with the expectation that government legislation, policy, regulations and standards are followed, and that **school authorities** are accountable to meet the learning needs of all of their students, for the results achieved and for the use of resources.

Revised

4. **School authorities** are expected to:
   a) meet the conditions and requirements outlined in this manual, and

   b) meet the provisions under Sections 39(1) and 47 of the *School Act*, by
      i. ensuring that courses of study or education programs prescribed or authorized by the Minister are followed;
      ii. ensuring that the amount of instructional time prescribed by the Minister is made available to a child or student in a school year;
      iii. ensuring that only those instructional materials authorized or approved by the Minister are used in schools;
      iv. ensuring that, subject to the right of a board to provide religious instruction, a course, an educational program, or instructional material that has been prohibited by order of the Minister, are not used in schools;
      v. ensuring that goals and standards applicable to the provision of education are met; and
      vi. providing access to special education programs for students in need of special education.

   c) meet the applicable requirements of the *Government Accountability Act* and the *Financial Administration Act*.

New

5. The documents listed in this manual in the Introduction under "References and Where to Find Them" should be used by **school authorities** as companion documents to the Funding Manual for School Authorities and should not be used exclusive of one another.

6. **School authorities** applying for funding shall keep on file the documents and invoices required to support their claim for each type of program funding described in this Manual, and the following information:

   a) an eligible enrolment count as of September 30 of the current school year or if September 30 is not a **school** day, the enrolment count for the last **school** day in September;

   b) copies of current **educational service agreements** or **transportation agreements**;

   c) a record of the daily attendance of each enrolled student and also for high school students, a copy of the timetable for each student as of September 30; and

   d) a list of **schools**, teachers and administrators involved in each program.

Revised

7. Alberta Learning reserves the right to request and review documentation to substantiate data submitted that determines funding allocations and that assists in conducting financial and other reviews. These reviews may be conducted off-site or on-site in a **school authority**.

Revised

8. An adjustment may be made in a payment or a penalty may be levied when a review or audit by Alberta Learning indicates that:

   a) a **school authority** has received funding to which it was not entitled;

   b) a **school authority** has not received funding to which it is entitled.

9. Payments in January, and subsequent payments shall be withheld from **private ECS operators** and **funded private schools** if the Audited Financial Statements or the Budget Report have not been submitted to the School Reporting Branch by the due date. When both forms have been submitted, payments will be released.

10. Payments may be withheld from **school jurisdictions** and **funded private schools** that are late in submitting: the Audited Financial Statements, Budget Report, School Board Three-Year Education Plan, Annual Education Results Report (AERR), or any other information requested or required by the **Minister** by the dates specified in the *School Act* and by Alberta Learning. Payments will be re-instated when the required information has been received by Alberta Learning.

11. **School authorities** must develop, keep current, and implement applicable written policies and procedures that are consistent with policies in sections 1 and 2 of the Policy, Regulations and Forms Manual.

12. **Early Childhood Services operators** who have received funding from Alberta Learning to provide an **ECS program** and have decided to cease operation may be required to return a portion of their accumulated operating surplus to the Minister of Finance.

13. The **Minister** may fund a **school jurisdiction**, other person, or organization for purposes related to the education of **children** in **Early Childhood Services Programs**, or students in **school** programs that are in addition to the funding provisions of this Manual.

14. All borrowings for capital expenditures by a **school jurisdiction**, and all borrowings for operating expenses by a **school jurisdiction** to the extent they exceed the account receivable balance as shown in the most recent audited financial statements, require the prior approval of the **Minister**. Section 183(1) & 183(2), *School Act*

Revised

A budgeted annual deficit for an upcoming school year is acceptable if, and only if, sufficient accumulated operating surplus is available to cover the planned shortfall without impairing the long-term financial health of the **school jurisdiction**. A **school jurisdiction** failing to submit an acceptable budget will be expected to work with Alberta Learning to achieve expected financial results, and may be subject to an inquiry under Section 41 of the *School Act* and to the appointment of an official trustee under Section 42 to conduct the affairs of the **school jurisdiction**.

Revised

A **school jurisdiction** incurring an accumulated operating deficit is expected to work with Alberta Learning to achieve expected financial results and may be subject to an inquiry under Section 41 of the *School Act* and to the appointment of an official trustee under Section 42 to conduct the affairs of the **school jurisdiction**.

PRINCIPLES AND PILLARS OF THE RENEWED FUNDING FRAMEWORK

Public education is a commitment by the people of Alberta to all its children. Public education is a provincial responsibility - one that is best discharged through a funding system that recognizes the right of all Alberta children to an equitable share of the province's resources in a universally accessible education system.

It is the responsibility of government to determine the mandate, goals and standards of the education system, provide the financial resources to achieve the goals, determine the desired level of performance, and report the results of the system's performance to the public on a regular basis. **School jurisdictions** have been delegated responsibility by the province to deliver education programs to meet the needs of all their students.

New

The renewed Funding Framework provides a means to allocate funding to **school jurisdictions** to provide a quality education, reflecting the needs of students and society. It is a funding system that distributes funds equitably, provides maximum flexibility to accommodate local decision-making, and is publicly accountable for the use of resources and the results achieved.

New

Principles:

1. ACCOUNTABILITY: The renewed Funding Framework has an increased emphasis on assessing and reporting outcomes achieved with the resources provided.

2. CONSISTENCY: The renewed Funding Framework provides a means to apply the rules and conditions for base funding consistently across the province.

3. EQUITY: The renewed Funding Framework provides a means to distribute available resources in a fair and equitable manner. The funding mechanism recognizes factors beyond the control of **school jurisdictions** that influence relative costs between jurisdictions.

4. FLEXIBILITY: The renewed Funding Framework provides **school jurisdictions** with the flexibility required to address local needs and priorities.

5. PREDICTABILITY/STABILITY: The renewed Funding Framework provides a means for planning that is consistent with the provincial goals for the basic learning system. The framework provides stability for **school jurisdictions** in dealing with changing circumstances and is effective in periods of stability, growth or decline.

6. SIMPLICITY: The renewed Funding Framework provides a means to minimize the administration processes required to obtain funding and report on expenditures.

7. TRANSPARENCY: The renewed Funding Framework is understandable by stakeholders. The rationale for allocation formula(s) is based on objective criteria.

8. MAINTAIN PROVINCIAL GOALS: The renewed Funding Framework provides a means for the provincial government to set goals and priorities for the basic education system and provides the government with the ability to pilot and monitor initiatives.

New

Pillars of the Funding Framework

The renewed Funding Framework is based on a foundation of three pillars: Flexibility, Accountability, and Funding. The Flexibility and Accountability pillars will be implemented in 2003-2004. The Funding pillar is under development.

FLEXIBILITY: The renewed Funding Framework provides **school jurisdictions** with the flexibility to spend funding on student needs and local priorities. The allocations to **school jurisdictions** are provided with minimal conditions and minimal spending direction. **School jurisdictions** have increased flexibility to decide how they will spend their resources, which learning resources they will use, and how they will implement the various education programs they choose to offer. These changes respect the decision-making process of the local **school jurisdictions** at the same time ensuring that boards are accountable for meeting the learning needs of all their students.

ACCOUNTABILITY: The renewed Funding Framework provides flexibility in how funding allocations are used and increased emphasis on local accountability for results. Many of the input reporting and expenditure directions have been removed and replaced with increased emphasis on outcomes measurement. School board performance will be measured and reported by assessing current results against targets. **School jurisdictions** will set targets for measures that have historical data or benchmarks. Targets will be set for new measures once baseline data has been collected. Target levels are expected to be met and action taken if improvement is needed. School boards will be accountable for meeting the learning needs of all students and for ensuring provincial policy, legislation, regulations and standards are met.

FUNDING (under development): The renewed Funding Framework provides a means to allocate funds to **school jurisdictions** using a "jurisdiction profile" model to ensure funding consistency and fairness across the province. This profile model is based on the premise that **school jurisdictions** should receive funding over and above the base costs of operations for cost factors that are beyond the control of **school jurisdictions**. A series of formulas that recognize these cost factors will be used to build jurisdiction profiles to determine the level of funding a **school jurisdiction** will receive.

New

Explanatory Details of the Pillars

FLEXIBILITY PILLAR

The renewed Funding Framework provides **school jurisdictions** with flexibility to operate effectively and efficiently to offer programs that meet the educational needs of all their students. **School jurisdictions** have the freedom to make decisions on how they deploy resources, which learning resources they use and how they implement the various educational programs they choose to offer. It facilitates local decision-making and the involvement of school principals, teachers, school support staff and parents in deciding how education funds are used. This increased flexibility provides **school jurisdictions** with greater opportunity to meet the educational needs of all their students.

RESTRICTIONS:

1) the maximum expenditure for system administration and board governance will continue to be between 4.0 and 6.0 percent depending on the student enrolment of the **school jurisdiction**. Alberta Learning may deduct from the **board's** general revenue allocation the amount by which the **board's** expenditure exceeded the maximum expense limit.
2) transfers of revenues into or out of Plant Operations and Maintenance, which are funded by Alberta Infrastructure, are not permitted; and
3) funding for the provincial initiatives, the Alberta Initiative for School Improvement, the Student Health Initiative and Supernet, must be spent on the program for which it was provided.
4) Areas where funding is based on actual cost will continue on this basis for 2003 - 2004 (ie. Program Unit Funding, Institutional Program Funding and Regional Educational Consulting Services).

New

ACCOUNTABILITY PILLAR

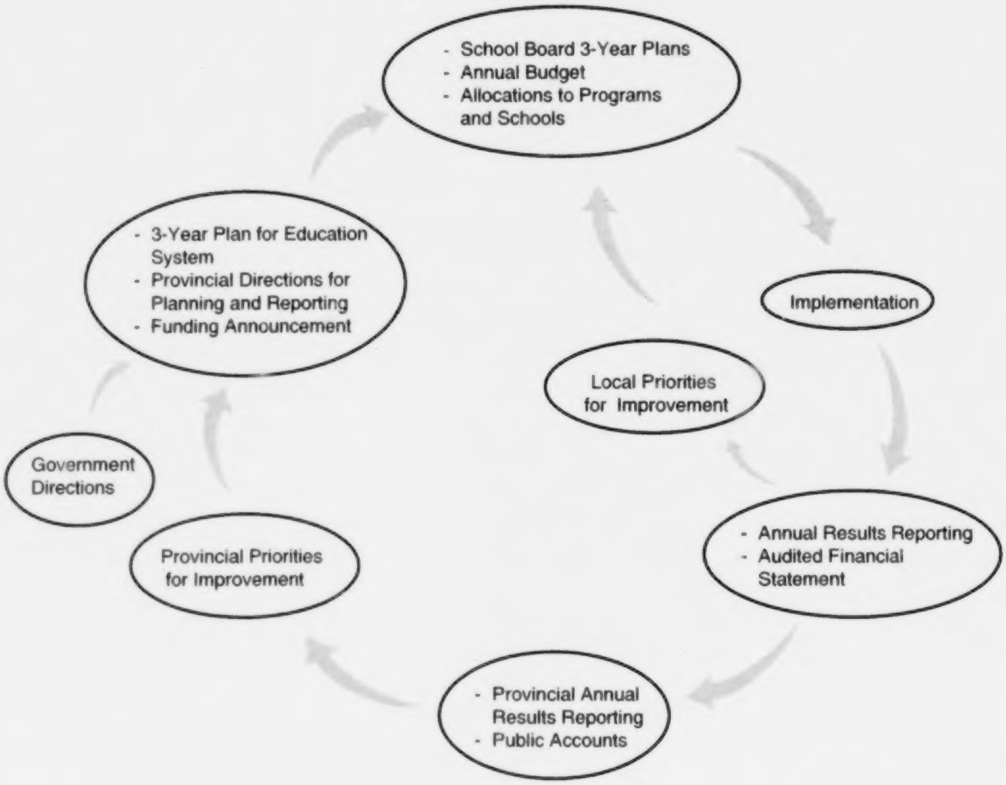
School jurisdictions prepare Three-year Education Plans and assess and report on the results annually in Annual Education Results Reports (AERRs), as required by the *Government Accountability Act*.

Accountability Framework for ECS – 12 Education

The Government's Accountability framework, centered around the educational needs of students, is an ongoing cycle that enables continuous improvement and critical reflection by:

- setting priorities, measuring progress, and using results to develop actions to improve;
- aligning jurisdiction and provincial goals and priorities;
- incorporating community output;
- allocating resources to achieve goals and improve results; and
- communicating with stakeholders (staff, students, parents, school councils, the public, and Alberta Learning) about **school jurisdiction** and **school** directions and results.

Accountability Cycle for Continuous Improvement in ECS – 12 Education in Alberta


- School Board 3-Year Plans
- Annual Budget
- Allocations to Programs and Schools
Implementation
Local Priorities for Improvement
- Annual Results Reporting
- Audited Financial Statement
- Provincial Annual Results Reporting
- Public Accounts
Provincial Priorities for Improvement
Government Directions
- 3-Year Plan for Education System
- Provincial Directions for Planning and Reporting
- Funding Announcement

New Each level in the Accountability Framework plays a key role.

GOVERNMENT OF ALBERTA – sets provincial direction and allocates funds to ministries; monitors and reports on progress; and uses results to plan improvements.

ALBERTA LEARNING – prepares three-year learning system business plans and guidelines for **school jurisdictions**' planning and reporting based on provincial direction; assesses and reports annually on results and uses results to plan improvements; identifies provincial priorities for improvement; allocates funds to **school jurisdictions**; defines basic education; and reviews **school jurisdictions** plans and results for compliance with provincial requirements to identify implications for provincial level planning.

SCHOOL JURISDICTIONS – develop and implement three-year education plans aligned with Ministry direction; allocate resources to **schools** and programs; monitor progress; assess and report results annually to stakeholders and use the results to plan improvements.

SCHOOLS – develop and implement three-year education plans aligned with school board direction; monitor progress; assess and report results annually to stakeholders and use results to plan improvements.

The Accountability Pillar measures will reflect the following categories and be aligned with the Alberta Learning Business Plan:

1. Student Achievement
2. High School Completion
3. Children at Risk
4. Safe and Caring School Environment
5. Parent Involvement
6. Satisfaction Rates
7. Board Selected Indicator

New

The performance of **school jurisdictions** will be assessed on the accountability measures, and results will be evaluated against specific and well-defined targets. If a target level is not achieved or results do not show improvement, the **school jurisdiction** and Alberta Learning will work collaboratively to develop strategies to improve results.

The guidelines and requirements for **school jurisdiction** Three-year Education Plans and Annual Education Results Reports (AERRs) are contained in the *Guide to School Board Planning and Results Reporting.* The February 2003 edition of the guide will be revised to reflect the additional measures in relation to the required provincial goals and outcomes, the phase in of the measures and assessment of results reporting and action planning to address areas requiring improvement. The revisions will also include updated information on target setting, surveys, assessment criteria and terminology.

New

FUNDING PILLAR - Under Development

For the 2003 - 2004 school year the funding formulas that were in place for 2002 - 2003 will continue.

REVENUE SOURCES FOR SCHOOL JURISDICTION FUNDING

The government provides **school jurisdictions** with their funding allocation from either or both of the following sources of revenue:

- The Alberta School Foundation Fund (ASFF) provides payments on an equal amount per eligible student (1); and

- The General Revenue Fund (GRF) provides grants authorized by the **Minister**.

Alberta School Foundation (ASFF)

The term "school boards" does not include Francophone Regional Authorities for purposes of ASFF.

The equal amount per **eligible student** from the ASFF is calculated by dividing the total requisition revenue collected by the province and opted out separate school boards by the total number of **eligible students**. All school boards will receive this dollar amount per

eligible student.

When a separate school board has opted out of the ASFF and the local requisition per student is less than the ASFF payment per **eligible student**, the difference will be paid from the ASFF. If the local requisition is more than the ASFF payment per **eligible student**, the difference must be paid into the ASFF.

General Revenue Fund (GRF)

In a school year, a **school jurisdiction** will receive funding from the GRF of the province equal to its funding allocation less the payments it receives from the ASFF (if applicable).

For example, a public **school jurisdiction** entitled to a funding allocation of $30 million and receiving $10 million in ASFF payments would be eligible for funding of $20 million from the GRF.

[1] For an opted out separate school board, the sum of the ASFF payment provided by the province and the tax revenue collected from the board's declared ratepayers would equal the ASFF payment the separate board would otherwise receive if that board participated fully in the ASFF.

Payment of a Funding Allocation

A funding allocation is calculated in the same way for public and separate school boards participating in the ASFF and separate school boards that have opted out of the ASFF.

School boards will receive a payment from the ASFF equal to their number of **eligible students** multiplied by the amount per **eligible student.** The difference between a school board's funding allocation and payment from the ASFF is provided by a grant from the GRF of the province.

Separate school boards that have opted-out of the ASFF receive local education property tax requisitions quarterly from their declared taxpayers. Alberta Learning provides a monthly advance on the local education property tax requisition that is repaid by the opted out board by the last banking day of each of the months of March, June, September and December. Opted out separate school boards whose local requisition per **eligible student** is less than the provincial payment per **eligible student** will also receive a payment from the ASFF that, when combined with their local education property tax requisition, would be the same amount they would receive if participating in the ASFF. The balance of the funding allocation for an opted out separate school board is provided by a grant from the GRF of the province.

NEW

FLEXIBILITY WITH ACCOUNTABILITY

The 2003-2004 school year is the transition year in which we are moving to partial implementation of a new funding allocation model. For 2003-2004, the Flexibility and Accountability pillars are being implemented (see Framework section for details on pillars). The program funding areas and formulas used in 2002-2003 will continue to be used for 2003-2004. However, greater flexibility has been provided by removing many of the restrictions on the funding. Part 1 has changed considerably from 2002-2003 as some of the renewed Funding Framework terminology and structure is being introduced in 2003-2004. For example, some program funding areas have been combined into a section called Funding in Transition.

PART 1 of the 2003-2004 *Funding Manual for School Authorities* describes the funding allocations that will be determined using the formulas from the previous funding framework. **School jurisdictions** will use these allocations to provide local program and service priorities that meet the needs of all of their children and students. Although the Framework provides the flexibility needed to accommodate local decision-making, it also requires public accountability for the use of resources and for the results achieved.

ALLOCATION FORMULA

ECS Basic Instruction Allocation = Number of eligible ECS **children** x Funding rate per ECS **child**

ALLOCATION CRITERIA

Revised 1. Basic instruction funding is provided to a **school jurisdiction** for each eligible **child** enrolled in an **ECS program**.

Revised 2. The ECS count must not include any **child** counted by another **ECS operator** for funding purposes in the school year. An eligible **child** can only be claimed by one **ECS operator** per year. The **school jurisdiction** claiming the **child** is responsible for ensuring another **ECS operator** in the current school year did not claim the **child**.

However, if a **child** is attending more than one **ECS program** on September 30 and a resolution cannot be reached as to which **ECS operator** should count the child, then the Basic Instruction funding will be split accordingly. For example, a **child** may be enrolled in a morning program with one **ECS operator** and also enrolled in an afternoon program with another **ECS operator**. Neither operator may be aware of the duplicate enrolment until Alberta Learning has identified the enrolment conflict. If at that time, a resolution cannot be reached as to which **ECS operator** should count the **child** then the Basic Instruction funding is split accordingly.

Revised 3. **School Jurisdictions** are eligible for one year of basic instruction funding for regular ECS **children**. **Children** must be at least 4 years 6 months of age and less than 6 years of age on Sept. 1. The minimum age may vary depending on the school entrance age policy of the **school jurisdiction** the **child** will enter. Alberta Learning will not provide more than one year of funding for a regular ECS **child**.

New 4. ECS **children with disabilities** may qualify for more than one year of funding. See definition of **child** in the Glossary of Terms.

5. All individuals age 5 years and 6 months or older, but less than 6 years of age on September 1 are counted as **funded students** (rather than as **children**) if they are eligible to enter grade 1 under the **school** entrance policy of a **school jurisdiction**. The exceptions to this are:

   a) if the **child** has spent less than the number of years in the program for which he/she is eligible for funding, i.e., received less than three years program unit funding; or
   b) if the **child** has not enrolled in an **ECS Program** prior to this age; or

c) if the **child** has been identified as **developmentally immature**. This **child** is not eligible for special needs funding and should not have been identified as special needs in prior years.

In these circumstances, when in the opinion of the **school jurisdiction** and the **parent**, an **ECS Program** is appropriate, the individual is counted as a **child** under ECS.

6. All individuals who are age 6 years or older, but less than 7 years of age on September 1 are counted as **funded students** except individuals who are in an **ECS program** and are:

   a) **developmentally immature** or
   b) entering an **ECS program** for the first time.

   These individuals (a and b) are counted as **children**.

7. An individual who is eligible to proceed to grade 1, but has been identified as **developmentally immature** and whose program plan involves both ECS and grade 1 instruction may be counted either as a **child** or as a **funded student**.

8. Individuals aged 6 to 7 years old, who require another year of ECS and who have been assessed as having special needs (mild, moderate or severe) must be counted as **funded students**.

9. Under no circumstances can an individual be counted as both a **funded student** and as a **child** in the same school year.

PROCEDURES, DOCUMENTATION AND REPORTING

1. Funding for ECS basic instruction is made on the basis of **child** registration information submitted to Information Services.

2. For **ECS programs** beginning in September, the **count date** is September 30 and the information must be submitted by October 3 to Information Services.

3. For **ECS programs** beginning after September 30, the count will be taken as of the last **operating day** in the month in which the **ECS program** begins. The information must be submitted within three weeks of that day to Information Services.

4. Adjustments to enrolment data:

   a) If an adjustment is required to the enrolment data reported to the Information Services Branch, **school jurisdictions** must ensure that changes are made to their modification file.
   b) After receiving your first RACERS data, any modification required can be submitted electronically using the "Add, Change, Delete" form (Form 03AL1.2c) before the April 30 deadline.

ADDITIONAL INFORMATION

1. An approved **ECS operator** must be prepared to accept and organize programming for all eligible **children** for whom programming is requested, including **children with special needs**.

2. A **child** referred to in Section 30(1)(a) of the *School Act* is not a resident or non-resident student of a **board**, therefore, **school jurisdictions** shall not use the residency or non-residency of the **parent** of a **child** in a district or **division** to:

   a) deny a **child** access to the program; or

   b) differentiate as to the fees charged for the program.

3. Alberta Learning provides funding for a basic 475 hour **ECS program** which includes support for instructional salaries and benefits, learning resources, furnishings and equipment. **School Jurisdictions** may not charge a fee for services provided within the basic 475 hour program.

4. A **school jurisdiction** may charge a fee to **parents** of ECS **children** in a basic 475 hour program to offset non-instructional costs such as supplies, snacks and field trips.

5. **School jurisdictions** that offer an **ECS program** with more than 475 hours may charge a reasonable fee to cover the cost of the additional hours.

6. **School jurisdictions** may use funds provided by Alberta Learning for ECS to Grade 12 programs to meet the learning needs of all their ECS **children** and **funded students**.

REFERENCES

Advisory Manual on Early Childhood Service for Incorporated Non-profit Societies or Private Schools

Kindergarten Program Statement

Early Childhood Services Policy 1.1.3

Early Childhood Services Regulation AR 31/2002

ALLOCATION FORMULA

1. The total allocation for Basic Instruction is the aggregate of a), b), and c) and calculated as follows. Up to 60 CEUs, including CEUs completed in Integrated Occupational Programs and regular programs, will be funded for each grade 11 and 12 **funded student** for a school year.

a) Basic Instruction – Grades 1 – 12:

Basic Instruction Allocation = [Number of **funded students** in gr. 1 - 9 **X** Funding Rate] +

[Number of **funded students** in grade 10 (except IOP) completing 31 or more credits Sept. – June (includes regular day, weekend, and evening courses) **X** Rate per **funded student** (full-time program)] +

[Number of **funded students** in grade 10 (except IOP) completing less than 31 credits Sept. – June (includes regular day, weekend, and evening courses) **X** Rate per **funded student** (partial program)] +

[Number of CEUs completed by **funded students** in gr. 11 – 12 (includes regular day, weekend, evening and summer courses) **X** CEU Funding rate] +

[Number of **students with special needs** 15 years of age or older on September 1 – grade 10 **X** Rate per **funded student** (Gr. 10 full-time program)] +

[Number of **students with special needs** 15 years of age or older on September 1 – grades 11 and 12 **X** [35 CEUs **X** CEU Funding rate]]

b) Summer Courses – Grade 10:

Summer Course Allocation (Grade 10) = [Number of CEUs completed by **funded students** in grade 10 **X** CEU Funding Rate]

c) Students in Integrated Occupational Programs (IOP):

IOP Allocation = [Number of IOP **funded students** in grade 10 completing 31 or more credits* (Sept. – June) X Rate per IOP **funded student** (full-time program)] +

[Number of IOP **funded students** in grade 10 completing less than 31 credits* (Sept. – June) X Rate per IOP **funded student** (partial program)] +

*Calculated at 5/3 times each credit completed

[Number of IOP CEUs completed by **funded students** in grades 11 and 12 for the school year X Funding rate per IOP CEU (5/3 x CEU rate)]

i) To be eligible for IOP funding, at least 50 percent of a grade 10 IOP student's total credits completed must be comprised of approved IOP credits.
i.e., For a student who completes 20 credits (no 5/3 adjustment), 10 or more credits must be approved IOP course credits for that student to be defined as an IOP student for funding purposes.

ii) For **funded students** in grade 10, IOP course credits will be counted towards a full-time or partial program basis at 5/3 times each credit completed.

iii) **Funded students** in grades 11 and 12 taking IOP courses will continue to be funded on a CEU basis.

ALLOCATION CRITERIA

1. Basic instruction funds are provided to a **school jurisdiction** for each **funded student** in grades 1 to 12.

Revised

2. All individuals who are at least 6 years of age but less than 20 years old on September 1 may be eligible for this funding. See definition of **funded student** in the Glossary of Terms.

Revised

3. All individuals aged 5 years and 6 months or greater, but less than 6 years old on September 1 are counted as **funded students** if they are eligible to enter grade 1 under the **school** entrance policy of a **school jurisdiction**. See definition of **child** and **funded student** in the Glossary of Terms for exceptions.

4. Under no circumstances can an individual be counted as both a **funded student** and as a **child** in the same school year.

5. An individual who is eligible to proceed to grade 1 and is less than 7 years old on September 1 who has been assessed as **developmentally immature** and whose

program plan involves both ECS and grade 1 instruction may be counted either as a **child** or as a **funded student**.

6. For students in grades 1 to 10, funding provided is based on enrolments as of September 30.

7. **Course Completions for Students in Grades 10 to 12**

Revised

Basic instruction funding for senior high school students is provided based on the principle that instructional services are provided and courses are completed. Instructional services must be timetabled for both students and teachers.

New

The Board Chairman, Superintendent and Secretary-Treasurer of the **school jurisdiction** are required to sign the following Declaration of Management:

> We certify that the Credit Enrolment Units (CEUs) submitted by the jurisdiction are complete, accurate and do not contravene, either directly or indirectly, the funding guidelines for CEU funding as outlined in the *Funding Manual for School Authorities* provided by Alberta Learning. As the political, educational and financial leaders, we support the education practices of the jurisdiction and affirm that the policies of the jurisdiction are in alignment with the intent of education funding to provide a quality education that best meets the needs of students.

This declaration will be included in RACERS and should be printed, signed and submitted to School Finance. The declaration will be considered part of the accountability of school boards in reporting CEUs for funding purposes.

All course completions claimed for funding must meet the general conditions of funding as outlined in the Introduction section of this manual. Additionally, the conditions that all courses must meet are the following:

a) A regular course (non-CTS) is considered completed for funding purposes when:

Revised

  i) a student has earned a mark of 50% or better in the course; or
  ii) a student has:
    1. earned a final mark of at least 25% (but less than 50%) in the course, and
    2. has attended at least 50% of the classes in the course
       or
       has worked on and been assessed for at least 50% of the course content.

For diploma examination courses condition 7(a) only applies to the school-awarded portion of the mark.

Revised

b) For regular courses delivered to students on-line or by distance learning the attendance funding criteria may not apply. Funding will be provided if the student has:

i) earned a mark of 50% or better in the course, or
ii) earned a final mark of 25 % or greater in the course and has worked on and been assessed for at least 50% of the course content.

Revised

c) For all regular courses (non-CTS), **schools** must maintain course outlines, detailed assessment records of student work in the course, records of student withdrawal, student attendance, and final marks. Also see Procedures, Documentation and Reporting in this section for more details.

Revised

d) A one credit CTS course is considered completed for funding purposes when a student has worked on and been assessed for at least 50% of the course content.

e) Funding will not be provided for an incomplete CTS course if the prerequisite(s) was not completed in the same term or a prior term.

f) For all CTS courses, **schools** must maintain course outlines and detailed assessment records of student work in the course. Also see Procedures, Documentation and Reporting in this section for more details.

g) Basic instruction funding will be provided for **funded students** in grades 10 (full-time program funding), and grades 11 or 12 who attend **school** in another province with which the **school jurisdiction** has an agreement under Section 62 (2)(a)(iii) of the *School Act*.

h) Course Completion Status:

Revised

- A "complete" (COM) status should be used when a student finishes a regular course or when a student successfully completes a CTS course. A course completion status of COM may be used for all courses.

- A "withdrawal" (WDR) status should be used when a student chooses not to complete a course and the **school** agrees to remove the student from the course. When a completion status of WDR is used, the course will not appear on a student's transcript. A course completion status of WDR may be used for all courses.

- An "incomplete" (INC) status should be used when a student does not withdraw from a CTS course yet does not demonstrate mastery of all the learner expectations identified in the Program of Study. An incomplete status has no associated mark(s). A course completion status of INC may only be used for CTS courses.

- When a course is reported as eligible for funding, all funding conditions must be met and all supporting documentation maintained, regardless of the completion status reported.

8. Funding for Funded Students in Grade 10

Basic instruction funding for grade 10 students is based on the following:

a) Grade 10 students (excluding IOP) taking a full-time program will be funded at $5,097 per student. A full-time program is determined to be 31 or more credits earned during September to June of the grade 10 school year.

b) Grade 10 students (excluding IOP) taking a partial program will be funded at $2,548.50 per student. A partial program is determined to be less than 31 credits earned during September to June of the grade 10 school year.

c) Funding is provided to the **school authority** where the **funded student** was enrolled on September 30. If a **funded student** is enrolled in two or more **school authorities** on September 30, the priority **school authority** will receive the applicable funding (i.e., full-time program or partial program). See Section 7.1 for Priority School Authority Conflict resolution details.

d) If a grade 10 **funded student** transfers to another **school authority** after the September 30 **count date**, and if the student did not earn any credits with the first **school authority**, the second **school authority** will receive the applicable funding (i.e., full-time program or partial program).

e) All grade 10 course credits earned with the priority **school authority** from September to June, where instruction is provided, and including those earned during regular **school** hours, weekends or evenings, provided through **schools** off-**school** site instruction, **outreach programs**, and Alberta Distance Leaning (ADL) courses, will be counted towards a full-time or partial program for funding purposes.

f) For summer **school** course credits, which start and end during July and August, funding will be based on Credit Enrolment Units (CEUs). If a student completes grade 9 in June of a school year and takes a grade 10 course(s) in the following summer months, the courses will be paid for on a CEU basis and the credits will not count towards a full time or partial program for the September to June grade 10 school year. The student taking the grade 10 summer course(s) must enter grade 10 in the September following the grade 9 year. If the student does not enroll in grade 10 in September, the CEU funding for the summer courses will be withdrawn.

g) Full-time program funding of $5,097 is provided for grade 10 **students with special needs** who are 15 years of age or older on September 1. This funding is also provided for students in **outreach programs** who are coded as having special needs.

h) Grade 10 **funded students** enrolled in at least one of the following English as a Second Language (ESL) courses: ESL 1120, 1121, 1122, 1123, or 1125, will be funded at 17.5 credits per student per semester ($2,548.50) or 35 credits per student for a full year ($5,097). The credits earned in another semester during the grade 10 school year will be added to the 17.5 credits for the ESL semester. If the credits for the two semesters total 31 or more, full-time program funding of $5,097 will be provided.

i) When two **french as a second language (FSL)** courses are taken in grade 10 in the same term, only one course will be counted for credit to determine full-time or partial program eligibility.

j) Full-time program funding is provided for grade 10 **funded students** enrolled in approved Institutional programs (Code 550) on September 30.

k) Full-time program funding is provided for Alberta grade 10 **funded students** who are on a **reciprocal exchange program** approved by Alberta Learning.

l) Full-time program funding is provided for Alberta grade 10 **funded students** enrolled with a Lloydminster school division on September 30.

m) Credits must be submitted to Alberta Learning for the school year in which they were earned (i.e., credits earned in one year cannot be claimed in another year).

n) Credits granted through **challenge assessments** for grade 10 students will not be counted towards a full-time or partial program for funding purposes.

o) Integrated Occupational Program (IOP) course credits will be counted towards a full time or partial program at 5/3 times each credit completed.

p) Credits earned for senior high courses provided during weekends and evenings will be counted towards a full-time or partial program for funding purposes.

q) Credits earned for Registered Apprenticeship Program (RAP), Work Experience, Special Projects and other credit courses involving substantial off-campus instruction will be counted towards a full-time or partial program for funding purposes.

r) Credits earned for repeated grade 10 courses will be counted towards a full-time or partial program for funding purposes as long as instruction is provided in accordance with the same requirements as the first time the course was taken. Credits for repeated courses taken, where the student previously received a mark of 100 percent in the course, will not be counted for funding purposes.

s) Credits earned for locally developed senior high school credit courses, where instruction is provided will be counted towards a full-time or partial program for funding purposes.

t) Credits earned for credit-bearing religious education courses, where instruction is provided will be counted towards a full-time or partial program for funding purposes.

u) Credits earned for Special Projects 10 - 20 - 30 courses will be counted towards a full-time or partial program for funding purposes.

v) Funding is provided on a full-time or partial program basis for students in grade 10 who take full year junior high courses; 5 credits will be counted for each course completed (form 03AL1.2a) towards a full-time or partial program for funding purposes.

w) Credits in ADL courses paid by a **school jurisdiction,** for students whose marks are reported by the ADLC, will be counted towards a full-time or partial program for funding purposes.

x) Credits earned by a grade 10 student who enrolls in a **school jurisdiction** after the September 30 **count date**, if the student was not enrolled in any **school authority** in Alberta on or before September 30, will be counted towards a full-time or partial program for funding purposes.

9. Funding for Funded Students in Grades 11 and 12

Basic instruction funding for students in grades 11 and 12 is based on the following:

a) Funding is provided on a credit enrolment unit (CEU) basis for senior high school courses completed during regular daytime hours, weekends, evenings and the summer months, with a maximum of 60 CEUs funded per student per school year (September to August). For senior high school courses with a credit value of 3, funding is based on 2.5 CEUs. For courses with a credit value of 5, funding is based on 5 CEUs. For courses with a credit value of 1, funding is based on 1 CEU.

b) Funding is provided for credits in senior high school courses completed during weekends, evenings, and the summer months.

c) Funding is provided for credits in Alberta Distance Learning (ADL) courses paid by a **school jurisdiction** for students whose marks are reported by the ADLC.

d) Funding is provided for RAP, Work Experience, Special Projects and other credit courses involving substantial off-campus instruction;

e) Funding is provided for repeated courses as long as instruction is provided in accordance with the same requirements as the first time the course was taken. Funding is not provided for students repeating courses where they previously received a mark of 100 percent in the course.

f) Funding is provided for high school credit courses completed that may not otherwise be counted towards a high school diploma (e.g. ESL 1125);

g) Funding is provided for credits earned through locally developed senior high school credit courses, where instruction is provided;

h) Funding is provided for credit-bearing religious education courses, where instruction is provided;

i) Funding is provided for credits in Special Projects 10 - 20 - 30 courses;

j) Funding is provided for students in senior high school who take full year junior high courses; the equivalent of 5 credits will be funded for each course completed (form 03AL1.2a);

k) For **students with special needs** who are 15 years of age or older on September 1 and classified as senior high students, funding is provided based on 35 CEUs. This funding is also provided for students in **outreach programs** who are coded as having special needs.

l) Integrated Occupational Program (IOP) course credits will be counted at 5/3 times the regular CEU rate for each credit completed;

m) Students registered on September 30 and enrolled in at least one of the following ESL courses: ESL 1120, 1121, 1122, 1123 or 1125, will be funded at the rate of 17.5 CEUs per student per semester or 35 CEUs for a full year. No additional funding is provided for other courses completed;

n) Funding is provided for credits granted through **challenge assessments** at 20 percent of the CEU value for the courses challenged;

o) When two French as a Second Language courses are taken in the same term; only credit for one course will be funded;

p) Funding based on 35 CEUs is provided for senior high school students enrolled in Institutional programs (Code 550) on September 30;

q) Funding is provided for courses that are completed but failed by students, on the basis of the number of credits for which the courses were taken;

r) For grades 11 and 12, when a student transfers from one high school to a high school in another **school authority** during a term in which a course is offered, the **school authority** that provided the majority of instructional minutes will receive the funding from Alberta Learning.

s) Funding based on the Basic Instruction rate is provided for each Alberta **funded student** who is on a **reciprocal exchange program** approved by Alberta Learning; and

t) Funding based on the Basic Instruction rate is provided for Alberta **funded students** enrolled with a Lloydminster school division high school on Sept. 30.

10. **Funding for Students in Integrated Occupational Programs (IOP)**

a) To recognize the extra costs of providing an IOP, the following funding is provided for those grade 10 **funded students** who are eligible IOP students:
   - $6,120 per funded IOP student in a full-time program. A full-time program is determined to be 31 or more credits completed during September to June of the grade 10 school year.
   - $3,060 per funded IOP student in a partial program. A partial program is determined to be less than 31 credits completed during September to June of the grade 10 school year.

b) To be eligible for IOP funding, at least 50 percent of a grade 10 IOP student's total credits earned must be comprised of approved IOP credits.
i.e., For a student who completes 20 credits (no 5/3 adjustment), at least 10 or more credits must be approved IOP course credits for that student to be defined as an IOP student for funding purposes.

c) For **funded students** in grade 10, IOP course credits will be counted towards a full time or partial program basis at 5/3 times each credit completed.

d) Students in grades 11 and 12 taking IOP courses will continue to be funded on a CEU basis.

11. **Payment Not Provided for Funded Students in Grades 10 to 12**

Basic instruction funding for students in grades 10 to 12 is **not** provided for:

a) waived or retroactive credits;

b) maturity credits;

c) courses completed by non-resident students and **First Nations students**;

d) high school credits taken by junior high school students (except for summer courses); this includes CTS courses completed by students in junior high school and Heritage Language high school credit courses;

e) post-secondary courses, including those that have been approved as locally developed courses;

f) credits granted through evaluation of out-of-province courses; or

g) extra-curricular or co-curricular activities, such as competing on an athletic team.

12. When a **student** meets the criteria of a **funded student** and is attending a **school** in Canada that is providing both an academic and an **activity program**, and a comparable program is not available in Alberta, and the **student** has been selected by **audition** to be part of the program he or she may be funded depending on individual circumstances. The **resident board** is required to have an approved tuition agreement under section 62(2) of the *School Act*. The tuition agreement must be

approved by the **Minister** and should be submitted to the Assistant Deputy Minister of Corporate Services. Once a tuition agreement is approved, students are eligible for funding under this section only.

PROCEDURES, DOCUMENTATION AND REPORTING

1. Basic instruction funding is based on:

   a) Student registration information in grades 1 to 10 as of September 30 that is submitted to Information Services by October 3;

   b) Course completion information for students in grades 10 to 12 as follows:
      i) Student Information System for specific enrolment;
      ii) Student Records System / Course Information Database System (CIDS) for course marks;
      iii) **Schools** are required to maintain and retain for a period of 7 years, records of student attendance, final marks, course outlines, detail assessment records for student work in the course and records of course withdrawal for students in grades 10 to 12.

   c) Student information on Form 03AL1.2b for students attending First Nations **schools**.

   d) Student information on Form 03AL1.2a for senior high students taking junior high courses.

2. Adjustments to enrolment data:

   a) If an adjustment is required to the enrolment data reported to the Information Services Branch on September 30, **school authorities** must ensure that changes are made to their modification file.
   b) After receiving your first RACERS data, any modification required can be submitted electronically using the "Add, Change, Delete" form (Form 03AL1.2c) before the April 30 deadline.

3. Basic instruction funding for students attending **school** in another province will be based on:
   a) a copy of the agreement under Section 62(2)(a)(iii) of the *School Act*; and
   b) a letter indicating the student's name, birthdate and grade.

4. Basic instruction funding for students that are attending a First Nations **school** will be based on:
   a) a copy of an agreement under Section 62 (2)of the *School Act*; and
   b) Form 03AL1.2b.

New

5. Funding for **students with special needs** who are directed by the resident **school jurisdiction** to another **school jurisdiction** under an **educational services**

agreement will be provided as follows:

a) The providing/registering **school jurisdiction** will register the student using the 140 code with the 500-grant code, the appropriate special needs code, and the resident **school jurisdiction's school authority** code.

b) The 140 code results in the student being included in the resident **school jurisdiction's** September 30 headcount and all related funding is provided by Alberta Learning to the resident **school jurisdiction**. This ensures that the **resident board** maintains responsibility for the student. No funding is provided by Alberta Learning to the providing/registering **school jurisdiction**. Payment for student's program is the responsibility of the resident **school jurisdiction**.

c) For students with severe disabilities coded as 140, the resident **school jurisdiction's** severe disabilities profile number will not be adjusted; therefore the resident **school jurisdiction's** severe disabilities funding will remain unchanged.

d) The 140 code cannot be used with students coded as 110, 145, 600, or 610.

e) The 140 code can only be used by **school jurisdictions**. The 140 code does not apply to **private schools**, **designated special education private schools** or **private ECS operators**.

f) RACERS will provide a report of **resident students** who have been coded as 140 by another **school jurisdiction.**

ADDITIONAL INFORMATION

1. The following conditions apply for students with mild or moderate special needs who are attending a **Designated Special Education Private School (DSEPS).**

a) A **school jurisdiction** that directs a student to a **DSEPS** will pay all program costs that are not covered by funding provided by Alberta Learning to the **DSEPS**.

Revised

b) The **DSEPS** must advise parents of the need to discuss their **child's** mild or moderate special needs eligibility and placement options with their **resident board** prior to enrolment in the **DSEPS**. The **resident board** should retain a record of the discussion. After consulting with the **resident board** about a special education program for their **child**, parents may make an informed decision on the most appropriate placement for the **child**. If parents then choose to send their **child** to the **DSEPS**, enhanced funding of $8,718 will be paid directly to the **DSEPS**, with no cost to the **school jurisdiction**. These students must be coded by the **DSEPS** using the funding codes 110 and 500 with the applicable special needs 50s code (mild/moderate).

If a parent enrolls their **child** in a **DSEPS** without consulting with the **resident board** on the **child's** eligibility for a special education program, the **DSEPS** will only be eligible for basic support funding of $5,343 (rather than enhanced funding of $8,718) for these students. Included in the basic support funding rate is funding for basic instruction, transportation and plant operation and maintenance. These students must be coded by the **DSEPS** using the funding code 500 with the applicable special needs 50's code (mild/moderate). The 110 code cannot be used for these students.

The **DSEPS** will report all students enrolled in their **schools** to the Information Services Branch. **DSEPS** will also notify **school jurisdictions**, in writing, of their **resident students** who registered at the **DSEPS**. The **DSEPS** will also forward a copy of this notification to the Director of School Finance, Alberta Learning, confirming which students' parents discussed placement options with their resident **school jurisdiction** and which did not. This confirmation will determine the basis of Alberta Learning's payment to the **DSEPS** (i.e., enhanced funding or basic support funding).

c) For students enrolled with a **school jurisdiction** on September 30 who transfer to a **DSEPS** after September 30 (or vice versa), funding must be transferred on a pro-rated basis based on a 10-month program. The funding transferred would be based on the months remaining in the school year. For example, if a student transfers to a **DSEPS** on December 1, funding would be transferred as follows:

   i) If the **parent** consulted with the **resident board** on the student's special education program, $6102.60 would be transferred (7/10 X $8,718).
   ii) If the **parent** did not consult with the **resident board** on the student's education program, $3,740.10 would be transferred (7/10 X $5,343)

   If the student returns to the **school jurisdiction**, the funding must then be returned by the **DSEPS** to the **school jurisdiction** on a pro-rated basis based on a 10-month program.

   No pro-rated funding will be provided by Alberta Learning to the **DSEPS** for students enrolled after September 30.

2. Alberta Learning has an agreement with the Canadian Copyright Licensing Agency (Cancopy). Most **schools** in the province are covered in the license. Alberta Learning makes the payment for the license on behalf of all participating **school jurisdictions** and **charter schools**. The cost of the license, plus GST, is recovered from **school jurisdictions** and **charter schools** on a full-time equivalent student basis.

3. Edulink, a multi-function data exchange software tool has been created to help simplify current data management and exchange processes.

   The Council of Alberta School Superintendents (CASS) and Association of School Business Officials of Alberta (ASBOA) have agreed their membership will provide the necessary funds to support Edulink for a three-year period –from September 2002 to August 2005. Alberta Learning will deduct 35¢ plus GST per **funded student** and **ECS child** on behalf of all participating **school jurisdictions** and **charter schools**.

This deduction will be made in September and based on the prior year frozen **funded student** and **ECS child** count. The deduction will be reflected on the October funding statement. It is up to the individual **school jurisdictions** and **charter schools** to apply for any GST rebate from the Government of Canada.

Alberta Learning will forward the maintenance fee of $195,000 to Edmonton Catholic Schools, the host **board**. This funding will provide for the annual maintenance budget but is not sufficient to pay for significant changes to the software.

4. The Alberta School Boards Association (ASBA) has asked Alberta Learning to deduct the ASBA membership fees plus GST from the instruction funding for most **school jurisdictions**. These deductions will be reflected on the October and April funding statements. The deduction is calculated by multiplying a weighted student count times a fee per student (set annually by the ASBA), plus a $6,500 basic fee charged to each **board**.

ALLOCATION FORMULA

1. The allocation for Basic Instruction in **outreach programs** is calculated using the same Allocation Formulas as described in section 1.2 of this manual.

2. A **school jurisdiction** will receive $51,000 per year outreach base funding for each **outreach program** to offset some of the higher costs associated with running an **outreach program.** Revised

ALLOCATION CRITERIA

1. The Allocation Criteria and Procedures, Documentation and Reporting requirements outlined in section 1.2 also apply for this section.

2. **Funded students** enrolled in home education, **on-line** or **blended programs** are not eligible for **outreach program** funding.

PROCEDURES, DOCUMENTATION AND REPORTING

1. In preparation for the transition to the new funding formula, applications for approval to begin operating a new **outreach program** will not be accepted after May 31, 2003. Where an **outreach program** ceases to operate, the **board** must immediately notify the respective Zone Services Director. Where the **outreach program** is operating as a **school** and the school is closing, the **board** must notify the **minister** of the **school** closure as per the *Closure of Schools Regulation* AR 238/97, amended by AR 223/2002. Revised

2. Grade 10 students enrolled in one **school jurisdiction** on September 30 who, after September 30, transfer directly to an **outreach program** in a different **school jurisdiction**, may be funded if the second **school jurisdiction** applies to Alberta Learning for **outreach program** funding. A letter should be sent to the Director of the School Finance Branch by April 30 providing the student name and Alberta student number, the date the student started in the **outreach program**, and any extenuating circumstances relevant to the request for funding. The School Finance Branch will review applications and funding will be determined based on the merit of the application.

ADDITIONAL INFORMATION

1. Students in an **outreach program** may also complete courses in a regular **school** environment.

REFERENCES

Outreach Program Policy 1.1.4

Standards for Special Education

Guide to Education: ECS to Grade 12, 2003

Alberta Learning Programs of Study

FUNDING ALLOCATION

1. Home Education:

$$\text{Home Education Allocation} = \left[\begin{array}{l}\text{Number of }\textbf{Home}\\ \textbf{Education students}\\ \text{Grades 1 – 12}\end{array} \times \begin{array}{l}\text{Home Ed.}\\ \text{Funding}\\ \text{Rate}\end{array}\right] +$$

a) add 50 percent of the compulsory ADL course costs for students enrolled in grades 7 to 12, as paid for by the **supervising board**, not exceeding the home education funding rate; and

b) add the compulsory ADL course costs for **home education students** in grades 1 to 6 taking a full course load of ADL courses which exceed the 50 percent funding provided by the **supervising board** to home education parents. (Refer to form 03AL1.4b)

2. Blended Program (as defined in the Glossary of Terms):

$$\begin{array}{l}\text{Blended}\\ \text{Program}\\ \text{Allocation}\\ \text{for each}\\ \text{Funded}\\ \text{Student}\end{array} = \left[\left\{\begin{array}{l}\text{Percentage of}\\ \text{School provided}\\ \text{Program}\end{array} \times \begin{array}{l}\text{Basic}\\ \text{Instruction}\\ \text{Rate}\end{array}\right\} + \left\{\begin{array}{l}\text{Percentage of the}\\ \text{Home Education}\\ \text{Program}\end{array} \times \begin{array}{l}\text{Home Ed.}\\ \text{Funding}\\ \text{Rate}\end{array}\right\}\right] +$$

The lesser of

a) 50% of the compulsory ADL course costs, and

b) the result of $\left\{\begin{array}{l}\text{Percentage of the}\\ \text{Home Education}\\ \text{Program}\end{array} \times \begin{array}{l}\text{Home Ed.}\\ \text{Funding}\\ \text{Rate}\end{array}\right\}$

The total funding for a **blended program** is the sum of all the amounts determined for each of the **funded students** in **blended programs**.

See ADDITIONAL INFORMATION in this section for calculation examples of the Blended Program allocation.

ALLOCATION CRITERIA

1. Funding may be provided to the **supervising board** for **home education students** the **board** has agreed to supervise and provide with learning resources.

2. Additional funding may be provided to the supervising board for **home education students** in grades 7 to 12 enrolled in the Alberta Learning Program of Studies through the Alberta Distance Learning Centre (ADLC) or through Distance Education Consortia operated by **supervising boards** in courses to a maximum of 50 percent of the cost of the registration fees and the compulsory learning materials for these courses. The cost of Alberta Distance Learning (ADL) courses funded by Alberta Learning for a **home education student** in a school year will not exceed the home education funding rate. This funding may be claimed on form 03AL1.4a.

Revised

3. Additional funding may be provided to the **supervising board** for **home education students** in grades 1 to 6 taking a full course load of ADL courses where the total compulsory course costs (net of any refundable deposit) exceed the 50 percent funding provided by the **supervising board** to the home education **parents**. This funding may be claimed on form 03AL1.4b.

4. Students enrolled in grades 1 to 9 and participating in a **blended program** and accessing 50 percent or more of their education program at **school** may be claimed as **funded students** by the **supervising board**. However, Alberta Learning will prorate the funding based on the percentage of the student's program taken at **school,** and the percentage of the student's program taken at home.

5. Students enrolled in grades 10 to 12 and participating in a **blended program** and accessing 20 percent or more of their education program at **school** may be claimed as **funded students** by the **supervising board**. However, Alberta Learning will prorate the funding based on the percentage of the student's program taken at **school**, and the percentage of the student's program taken at home.

6. In accordance with Section 8 of the *Home Education Regulation*, a **supervising board** shall provide to a **parent** of a student enrolled in a **blended program** an amount of money using the home education rate which is in proportion to the percentage of the program or courses provided by the **parent**.

7. When a student moves from one **supervising board** to another after September 30, and the receiving **supervising board** agrees to purchase ADL courses and related resources from the Learning Resources Centre, Alberta Learning will pay for 50 percent of the course costs to a maximum of the home education funding rate for the combined ADL purchases of both **supervising boards**.

8. **Home education students** and their **parents** must live in Alberta on September 30 of the current school year.

9. A **supervising board** must offer annually not less than 50 percent of basic funding for home education to the **parents** of **home education students** for the purchase of Programs of Study and instructional materials.

PROCEDURES, DOCUMENTATION AND REPORTING

Revised 1. Home education funding is based on:

   a) Student registration information in grades 1 to 12 as of September 30 that is reported to the Information Services by October 3; and

   b) Report of ADLC courses for **home education students** on form 03AL1.4a.

   c) Report of additional ADL course costs for grades 1 to 6 on form 03AL1.4b

2. **School jurisdictions** shall have home education policies in place that indicate which Programs of Study and instructional materials will be considered for reimbursement and the amount of reimbursement for students in **blended programs**.

ADDITIONAL INFORMATION

Funding for a **supervising board** for each student enrolled in a **blended program** on the September 30 **count date** is the sum of the calculations in (a) and (b) as follows:

a) Multiply the percentage of the student's school provided portion by the basic instruction funding rate for **supervising boards**, plus

b) Multiply the percentage of the student's home education portion by the home education rate including 50 percent of the ADL course costs to the pro-rated portion of the maximum.

Example 1:

Revised

A student in a home education program 40 percent of the time, using ADL courses and in a regular school program 60 percent of the time would be funded as follows:

Home education rate	40%	X	$1143	= $457.20
Plus ADL course costs to a maximum of 40 percent of home education rate	40%	X	$1143	= $457.20
Plus the Regular school rate (for the applicable grade)	60%	X	$4454	=$2672.40
Total				**$3586.80**

Example 2:

New

A senior high student in a home education program for 70% of the time and in a regular **school** program for 30% of the time would be funded as follows:

Home education rate	70%	X	$1143	= $ 800.10
Regular School Rate (for the applicable grade)	30%	X	$4454	= $1336.20
Total				= **$2136.30**

REFERENCES

Home Education Policy 1.1.2

Home Education Regulation AR 126/99

ALLOCATION FORMULA

ECS Mild/Moderate and Gifted and Talented Allocation	=	Number of **children with mild or moderate disabilities** and gifted and talented **children**	X	Funding Rate per eligible **child**

ALLOCATION CRITERIA

1. Funding is paid to a **school jurisdiction** to meet the educational needs for each eligible **child with a mild or moderate disability** or a **child** who is gifted and talented. **Children with mild or moderate disabilities** and **children** who are gifted and talented are eligible for a maximum of two years funding. To be eligible for funding, **children** must be at least 3 years 6 months of age on September 1 and less than 6 years of age on September 1.

2. A **child with a mild or moderate disability** who is at least 5 years 6 months of age and less than 6 years of age, and who is eligible for grade one (under the **school** entrance policy) may be eligible for mild-moderate ECS funding if the **school jurisdiction**, and the **parent** agree that an **ECS program** is the most appropriate placement. See the definition of **child** in the Glossary of Terms. Revised

PROCEDURES, DOCUMENTATION AND REPORTING

1. Special needs funding is based upon **child** registration information submitted to Information Services by October 3. Eligible **children** must be properly coded using exceptional student Code 30 for **children with mild or moderate disabilities** or code 80 for **children** who are gifted and talented and grants program Code 500 on the electronic SIS registration file or Alberta Learning Student Registration Form in order to receive this funding.

2. For **children** who have been assessed as having a mild or moderate disability or identified as being gifted and talented after the September 30 count has been submitted, but who were enrolled in the program on September 30, an "Add, Change, Delete" form (form 03AL1.2c) must be completed in order to receive this funding.

REFERENCES

Advisory Manual on Early Childhood Service for Incorporated Non-Profit Societies or Private Schools

Early Childhood Services Policy 1.1.3

Guide to Education: ECS – Grade 12

SECTION 1.6
ECS PROGRAM ENHANCEMENT PROJECT FUNDING

ALLOCATION FORMULA

New **School jurisdictions** that were approved for Program Enhancement Project (PEP) funding in 2002 - 2003 will be eligible to continue to receive this funding for 2003 -2004. No new project applications will be accepted.

ALLOCATION CRITERIA

New

1. This is a one-year extension that is being provided during the transition to the renewed Funding Framework. Future funding to meet the needs of children who are disadvantaged because of social and/or economic conditions will be addressed within the new framework.
2. **Designated special education ECS programs** are not eligible for PEP funding.

PROCEDURES, DOCUMENTATION AND REPORTING

1. **School jurisdictions** are responsible for evaluating projects annually and for documenting the achieved results.

ADDITIONAL INFORMATION

1. **School jurisdictions** may use PEP funding to provide additional hours of ECS instruction and compensatory programming aimed at raising the preparedness and performance of **children** to the level of **children** in regular programs. The compensatory programming should enhance the **children's** potential for coping and succeeding in **school.**
2. The coordinated delivery of interventions will be enhanced by collaboration with community-based government and private agencies, local **schools** and families. Specific attention should be given to the transition from ECS to grade 1.

ALLOCATION FORMULA

UNDER REVIEW

1. The allocation amount for each unit will be the lesser of:
   a) the approved budget amount,
   b) the program unit ceiling amount, and
   c) the actual cost.

2. a) Calculation of the ceiling amount for a program unit with one **child**:
   i) Centre-based program

$$\text{Program Unit Funding} = \frac{\text{Number of Centre Hours (max 800)}}{\text{800 hrs}} \times \text{Funding Rate for one } \textbf{child}$$

   ii) In-home based program

$$\text{Program Unit Funding} = \frac{\text{Number of Visits (max 36)}}{\text{36 visits}} \times \text{Funding Rate for one } \textbf{child}$$

   iii) Combined program – centre-based and in-home based program

$$\text{Program Unit Funding} = \left\{\frac{\text{Number of Centre Hours (max 800)}}{\text{800 hrs}} + \frac{\text{Number of Visits (max 36)}}{\text{36 visits}}\right\} \times \text{Funding Rate for one } \textbf{child}$$

The maximum payable under this calculation is the rate for one child.

   b) Calculation of the ceiling amount for a program unit with more than one **child** (clustering):

Choose the **child** with the highest combination of hours and/or home visits and calculate the ceiling for this **child** as follows:

$$\text{Program Unit Funding} = \left[\left\{\frac{\text{Number of Centre Hours (max 800)}}{\text{800 hrs}} + \frac{\text{Number of Visits (max 36)}}{\text{36 visits}}\right\} \times \text{Funding Rate for one } \textbf{child}\right]$$

Add to this amount for each additional **child** in the unit, the following:

$$\left[\left\{\frac{\text{Number of Centre Hours (max 800)}}{\text{800 hrs}} + \frac{\text{Number of Visits (max 36)}}{\text{36 visits}}\right\} \times \text{Funding Rate for each additional } \textbf{child} \text{ in the unit}\right]$$

c) Maximum funding for a program unit is based on an 800-hour program or 36 in-home visits or a combination thereof.

d) See ADDITIONAL INFORMATION at the end of this section for calculation examples.

ALLOCATION CRITERIA

1. Program Unit Funding (PUF) may be paid to a **school jurisdiction** for each eligible **child with a severe disability** for a maximum of three years.

2. The funding amount paid will be the lesser of the program unit ceiling, the approved budget total, and the actual cost.

3. To be eligible for funding, a **child with a severe disability** must be at least 2 years 6 months of age and less than 6 years of age on September 1. **School jurisdictions** should plan the **child's** program so that the last year of PUF is the year prior to the **child's** entry into grade 1.

4. Revised **School jurisdictions** will use the categories/codes and related definitions outlined in **students/ECS children with severe disabilities** in the Glossary of Terms to determine a **child's** disabling condition for PUF eligibility purposes.

5. A **child** receiving program unit funding is not eligible for ECS mild/moderate funding.

6. An eligible **child** can be claimed by only one **ECS operator** at a time. The **school jurisdiction** claiming the **child** is responsible for ensuring the **child** is not claimed by another **ECS operator**.

7. Eligibility for PUF will be based on all of the following:

   a) a diagnosis of a disability/condition at the severe/profound level by qualified personnel (note: a diagnosis alone is not necessarily sufficient to qualify for funding);
   b) documentation/assessments of the **child's** current level of functioning in the learning environment;
   c) a current **individualized program plan (IPP)** which addresses the **child's** diagnosed needs; and
   d) the levels of support and services being provided to the **child**.

   To expedite the approval process, assessment information to support the eligibility of the **children** should be submitted with the PUF application. This information should include actual reports, summary information, or a format agreed upon with Alberta Learning. When a **school jurisdiction** is uncertain of a **child's** eligibility, the operator is encouraged to discuss the issues of the **child's** eligibility with Alberta Learning prior to making an application.

PROCEDURES, DOCUMENTATION AND REPORTING

1. Payment of program unit funding is based on the approval of a Program Unit Application form (Form 03AL2.5a). Applications may be submitted either on paper or using the Program Unit Funding System (PUFS). A separate PUF application should be completed for each **school** that has **children** eligible for PUF. As part of the application, an individual budget must be submitted for each program unit listed on the application. The **school jurisdication** should provide current assessment information to support the PUF application. The completed application, with original signatures, must be submitted to School Finance. The assessment information should be sent to the Special Programs Branch.

2. The following information pertaining to **children** receiving PUF must be kept on file by **school jurisdictions**:

   a) an **individualized program plan (IPP)** must be developed, implemented and regularly revised for each **child**; and
   b) formal assessment documentation to support the severity of each **child's** special need (a current assessment report must be included with the PUF Application); and
   c) informal assessment documentation reflecting current performance levels; and
   d) plans and summaries of home visits conducted over the year; and
   e) current budget information.

3. The deadline for applications is January 1. **School jurisdictions** should plan and budget carefully for the school year as revisions will no longer be accepted. However, extenuating circumstances may be discussed with Alberta Learning personnel. Applications for **children** who are diagnosed or registered after January 1 will be accepted until May 1.

4. When a **child** leaves a program before the end date specified, a letter of notification must be submitted to the School Finance Branch outlining the following information:
   a) the **child's** program start date and end date; and
   b) an estimated cost of the **child's** program up to the time of departure. If no cost estimate is provided, the approved budget will be pro-rated based on the months the **child** was in attendance at the program.

   The original approved budget total and ceiling will then be reduced.

5. When a **child with a severe disability** moves from one **ECS operator** to another, a new PUF application based on the **IPP** must be submitted by the second operator prior to May 1 of the program year.

6. At the end of each school year, **school jurisdictions** must report actual expenditures for all program unit **children** using Form 03AL2.5b, Statement of Actual Expenditure, as follows:

   - Complete one statement for all program unit **children** except those program unit **children** in **designated special education ECS programs**.
   - Complete a statement for each approved **designated special education ECS program**.

   The form(s) must be returned to School Finance by October 15.

7. If a **child** has a medical condition/disability which has not changed significantly since the initial diagnosis and was previously approved by Alberta Learning, current documentation outlining assessments, treatment and current level of functioning may be sufficient to ensure continuation of PUF. This information should be kept on file and available for review by Alberta Learning.

   School jurisdictions must provide documentation to support continued PUF for previously eligible **children** with a severe communication disorder, a severe multiple disability (primarily involving language), or any other condition likely to change significantly as a result of intervention, maturation or changes within the **child's** environment. Documentation must include the following:

   - a statement from the appropriate professional that the **child** continues to demonstrate a severe disability;
   - description of the necessary supports and services the **child** requires as a result of the disability;
   - description of the impact of the disability on the **child's** ability to function within the ECS environment.

   It is the responsibility of the **school jurisdiction** to ensure that all **children** claimed under PUF meet the eligibility criteria outlined. **School jurisdictions** who are uncertain about the eligibility of a **child** are encouraged to contact the Special Programs Branch. Special Programs Branch staff will provide confirmation of eligibility.

8. A **child's** program hours and/or home visits must meet the **child's** needs. If a combined program of **school** hours and home visits is provided, the **in-home program** must include a minimum of four in-home visits in order to be included in the ceiling calculation (see example of ceiling calculation). See definition of **in-home program** in Glossary.

9. To access the full ceiling amount, the program offered must be a full time program.
   A full-time program must provide either 800 hours of instructional programming for a **child** in a center-based program or a minimum of 36 in-home visits for each **child** in an **in-home program** during the school year, or the equivalent combination of hours and visits.

10. 800 hours is the maximum number of hours that will be funded for ECS **children** receiving PUF. Summer programs are not eligible for PUF and should not be included as part of the 800 hour maximum.

    In some exceptional circumstances, for a **child's** last year of PUF, additional program hours beyond 800 hours may be approved, based on an individual **child's** needs. A written request explaining the reason for the additional program hours must be submitted with the PUF application for approval by the Special Programs Branch. This exception will be subject to the ceiling maximum.

11. PUF is supplemental to the Basic Instruction funding. It is intended to cover the additional educational program costs required to meet the **child's** severe special needs.

    When completing the budget for program unit costs, budget amounts should approximate anticipated costs. The following specifies the costs which may be included for PUF. Any exceptions to these costs should be discussed with Alberta Learning before submitting the application.

    a) Instruction

    Revised

       (i) Salaries, wages and employer's portion of benefits and expenditures applicable to teacher assistants directly involved in planning, implementing and evaluating the program for the **child(ren)** in the unit. The number of hours claimed here may exceed the **child's** program hours by up to 10 percent for each child within that program unit. Clustering and small group program delivery should be considered as alternatives to full-time direct one-to-one assistance.

    Revised

       (ii) Services Purchased – includes services of qualified personnel in the areas of speech therapy, occupational therapy, physiotherapy, mobility training, special education consultation, psychological and other services, and assessment costs for part or all of the program which are not provided free by public service agencies. Costs should be reasonable. **School jurisdictions** must keep records of all services purchased under PUF. All options regarding service delivery should be considered. **School jurisdictions** must ensure that all services purchased are relevant to the child's educational program and are in direct support of the goals and objectives included on the child's IPP.

       Special Education Consultation is a service purchased by the **school authority** to provide programming support for the ECS teacher. Examples of services provided under Special Education Consultation include IPP development and implementation, programming strategies, suggested resources and materials and support of the off-campus components of the program. Special education consultation is delivered by a certified teacher with the appropriate training and experience. On-site Special Education consultation costs are additional costs to the **school jurisdiction** that provide direct programming support. These costs will be subject to a maximum of

$1,500 per **child** based on a full-time program. For programs less than 800 hours, the $1,500 maximum will be pro-rated based on the program hours and/or number of eligible home visits. For example, special education consultation costs for 475 hours and 6 home visits would be calculated as:

$$\$1,500 \times \left(\frac{475}{800} + \frac{6}{36}\right) = \$1,141.$$

Revised

Costs for special education administration may not be claimed in this category. These costs are more appropriately covered by the administration category or by basic instruction funding. **School jurisdictions** must keep records of costs and services associated with special educational consultation.

(iii) Supplies and materials - instructional supplies and materials which are particular to the **child's** program, and are in addition to supplies purchased with basic instruction funding. Costs in this area are usually in the $200 - $500 range per **child**. For costs over this range, please attach a list of supplies to the application. **School jurisdictions** are encouraged to maintain a resource inventory and an equipment loan pool.

b) **Parent** Inservice - costs for **parents** who attend in-province workshops, seminars, inservice and specialized training sessions specifically related to the **child's** program and designed to enhance the ability of **parent(s)**/guardian(s) to assist in the **child's** development. Costs in this category are usually in the $100 - $400 range per **child**.

c) Staff Inservice - costs for teachers and teacher assistants who attend workshops, inservice, special courses and seminars related to staff responsibilities in the **child's** program and in parental assistance. Costs in this category are usually in the $200 - $500 range per **child**. Personnel included in Services Purchased are not eligible for Staff Inservice.

d) Transportation

Funding to urban and rural districts for transportation of ECS **children** is available by submitting an application electronically under sections 1.17 (Rural), 1.18 (Special), and 1.19 (Urban). Funding to metro urban districts is available using form 03AL2.6, ECS Transportation (Regular and Special), under section 2.6. PUF will pay for any transportation costs for **children with severe disabilities** not covered by these Transportation grants. In order to determine which transportation costs are covered by PUF, all transportation costs must be listed on the PUF budget, then all transportation revenues (from the above transportation grants) must be deducted from the transportation costs. The following descriptions indicate the types of transportation costs which can be claimed and which transportation grants are available. Note: transportation claims must be submitted to School Finance by November 30 and only **children** who were enrolled by September 30 are eligible.

i) Transportation to and from **school**: Transportation funding for these costs may be claimed by metro urban districts under section 2.6 and by rural or urban districts under section 1.18 for a **child** who requires special transportation; e.g. handi-bus, when, because of the severity of his or her disability or because of the **child's** age, the **child** cannot ride regular, rural or urban transportation or under section 1.17, 1.18, 1.19 for a **child** who is transported by a regular bus. Transportation costs for **children with severe disabilities** in excess of the funding paid under section 2.6, 1.17, 1.18, or 1.19 may be claimed as transportation costs under program unit funding;

ii) **In-Home Programs**: Transportation funding for these costs may be claimed under section 2.6 for metro urban districts and under section 1.18 by rural and urban districts for each scheduled visit made by a teacher, a **child** development specialist or a teacher assistant to the home of a **child** enrolled in an ECS **in-home program**. Transportation costs in excess of the funding paid under sections 2.6 or 1.18 may be claimed as transportation costs under program unit funding;

iii) Other - Field Trips: Transportation costs for this area may be claimed as transportation costs under program unit funding. Field trips claimed must be those provided in addition to field trips for the regular ECS class or for a **child** who, because of his/her disability, requires special transportation on a regularly scheduled field trip; and

iv) In-Program: Transportation costs for this area may be claimed as transportation costs under program unit funding. In-program transportation costs must be specified and must be for transportation of the **child** from one program to another program or agency as part of the **child's Individualized Program Plan (IPP)**.

e) Operation and Maintenance

Funding for this area is now provided by Alberta Infrastructure – Plant Operations and Maintenance funding. Costs for this category may not be claimed on the PUF budget.

f) Administration

Funding for this area is now provided under Section 1.9 Funding in Transition – System Administration funding. Costs for this category may not be claimed on the PUF budget.

g) Capital: Furniture and Equipment - expenditures for specialized furniture and equipment required to meet the special needs of the **child**, which are not available free or subsidized by another source.

Revised

i) For any major purchase, such as computer hardware, FM systems, etc., a written recommendation from an appropriate specialist is required indicating the necessity for the equipment. The letter from the specialist should specify the relevance of the equipment to the child's educational program and how it directly supports the goals and objectives of the child's IPP. The letter should also include projected costs of the capital equipment. This letter should be attached to the PUF application.

ii) Approval by the Special Programs Branch is required for all capital expenditures.

iii) Expenditures should not exceed 15 percent of the budget total.

iv) A specialized piece of furniture or equipment no longer used by the **child** remains the property of the **school jurisdiction**, not of the **child** or **parents** of the **child**. If a **child** changes **schools** in Alberta but continues to have use for the specialized furniture or equipment, the furniture or equipment goes with the **child**.

v) Renovations to a building to be used for the benefit of all **children** in the instructional area are not eligible for support under this section. **School jurisdictions** receive funding for renovations through the Building Quality Restoration Program (BQRP).

vi) Administrative capital purchases cannot be claimed under this category.

12. **Designated Special Education ECS programs.**

These are **ECS programs** where at least 70% of ECS **children** enrolled have a severe disability. The following requirements apply for these programs:

a) Prior approval is required to qualify for this status;

b) Operators who qualify for this status may claim all education program costs except capital building costs;

c) A budget based on the total education program costs must be submitted on the program unit funding application budget page for **designated special education ECS programs**;

d) Operation & Maintenance costs: This would include costs associated with the operation and maintenance of the school facility and would also include rent costs. PUF will cover costs in this category that exceed the funding provided by Alberta Infrastructure;

e) Administration: Reasonable costs for administration of the **ECS program** may be claimed here. Costs in this area are typically in the 6% to 12% range. Costs in this category should not include any central office admin. costs/charges covered by System Admin. Funding under Section 1.9;

f) Capital costs must meet the specific needs of a **child** or a group of **children** to be eligible. An itemized list of capital must be included with the application if costs are claimed in this category;

g) Alberta Learning will apply all applicable revenues to the total program costs (such as basic instruction funding, mild/moderate funding, Program Enhancement Project (PEP) funding, ECS transportation funding and other applicable revenues) to determine a net program cost total to which the program unit funding will apply;

h) **Designated special education ECS programs** must comply with all Conditions, Requirements and Considerations outlined in Section 1.7, Program Unit Funding, of the Funding Manual. These programs must also comply with the expectations outlined in the *Standards for Special Education* and the principles contained in Alberta Learning's *Kindergarten Statement (2000);*

i) Applications for new programs must be submitted as a proposal to the Director of the Special Programs Branch by June 1 for approval. To be considered for this designated status, the program must have operated for at least one year. Newly designated programs will be subject to program review within the first year. The proposal should contain the following information:

- a rationale for applying for status as a **designated special education ECS program** including the potential benefits to **children** with severe special needs and their families. The rationale should also explain why the program could not operate as a regular ECS program and should highlight how receiving the designated status will resolve those issues.
- an overview of the proposed program including population served, program format, service delivery model, support services provided, and a brief summary of the role descriptions of program staff.
- a proposed budget completed using form 03AL2.5a. This budget should outline all estimated expenditures and projected revenues; and

j) The status of approved **designated special education ECS programs** may be reviewed and withdrawn at any time by Alberta Learning.

ADDITIONAL INFORMATION

1. A **child with a severe disability** who:

a) is at least 5 years 6 months but less than 6 years of age on September 1 of the school year in which s/he is counted; and
b) is eligible to enter grade 1 under the **school** entrance age policy of a **school jurisdiction**; and
c) has not spent 3 years in an **Early Childhood Services program**,

may be eligible for PUF if, in the opinion of the **school jurisdiction** and the **parent,** an **ECS program** is the most appropriate placement for the **child**.

2. The calculation of the ceiling amount for a program unit with one child in it using examples of a centre-based program, an **in-home program** and a program based on a combination of centre hours and in-home visits is determined as follows:

Calculation of the ceiling for a centre-based program of 500 hours	Calculation of the ceiling for an in-home based program of 10 in-home visits	Calculation of the ceiling for a combined program based on 500 centre hours and 10 in-home visits
$\frac{500 \text{ hrs}}{800 \text{ hrs}} \times \$21,281$ $= \$13,301$	$\frac{10 \text{ visits}}{36 \text{ visits}} \times \$21,281$ $= \$5,911$	$\frac{500}{800} + \frac{10}{36} \times \$21,281$ $= \$19,212$

Note: If the calculation results in a number higher than the ceiling amount then the ceiling would apply.

3. The maximum program unit rates should be viewed as ceilings only. Provincial averages indicate the cost of most programs to be less than $14,000 per **child**. Careful stewardship of funds by **school jurisdictions** is integral to the PUF program.

4. The decision to cluster or group **children** into a program unit for programming purposes should be based on the educational needs of the **children** involved. However, it is expected that operators will cluster **children** with similar needs who receive services in the same setting and at the same time whenever possible.

5. For a program unit with more than one **child**, the ceiling is calculated as follows:
   - Choose the **child** with the highest combination of hours and/or home visits. Calculate the ceiling for this **child** as follows:

$$\left[\frac{\textbf{\# hours}}{\textbf{800}} + \frac{\textbf{\# visits}}{\textbf{36}} \times \textbf{\$21,281} \right]$$

   - To this amount, add, for each additional **child** in the program unit as follows:

$$+ \left[\frac{\textbf{\# hours}}{\textbf{800}} + \frac{\textbf{\# visits}}{\textbf{36}} \times \textbf{\$5,279} \right]$$

Example

For a program unit (cluster) of three **children**, where:
- **child** #1 has 500 hours and 10 home visits
- **child** #2 has 400 hours, no home visits
- **child** #3 has 600 hours and 4 home visits

The ceiling is then calculated as follows:

$$
\begin{array}{lrcr}
\left[\frac{500}{800} + \frac{10}{36}\right] & \times \ \$\,21{,}281 & = & \$19{,}212 \\
+\left[\frac{400}{800}\right] & \times \ \$5{,}279 & = & \$2{,}640 \\
+\left[\frac{600}{800} + \frac{4}{36}\right] & \times \ \$\ 5{,}279 & = & \underline{\$4{,}546} \\
= \text{Total ceiling for the unit} & & & \$26{,}398
\end{array}
$$

6. Funding ceilings will be adjusted when a **child** starts a program after December 31 or when a **child** leaves the program earlier than planned. In these situations, the ceiling will be the lesser of:
   a. a pro-rated ceiling amount of $2,128 per month for the number of months the program runs; or
   b. the ceiling amount based on the program hours and/or the # of home visits.

   For example, the ceiling amount for a **child** in a four month program with 300 hours and 4 home visits would be calculated as follows:

Ceiling calculation for a 4 month program in a 10 month program year
Lesser of: a) $21,281 X 4/10 = $8,512 or b) $21,281 X (300/800 + 4/36) = $10,345 Ceiling amount is $8,512

7. For **school jurisdictions** that are providing a program for a **child** with a severe disability in the regular ECS classroom:

   The Basic Instruction funding, Part 1, Section 1, is paid on behalf of all **children** in an **ECS program**. Basic Instruction funding is available for **children** with a severe disability who are as young as 2 years 6 months on September 1. This funding supports the day-to-day operating costs of the program, such as teacher salaries, rent, utilities, and supplies. Since these costs would be incurred whether or not a **child** with a severe disability was in the program, they should not be included in the program unit expenditures. Ordinarily, teachers' salaries should not be included as program unit costs because the basic instruction funding supports these costs.

8. For **school jurisdictions** contracting placement in a Day Care and for Day Cares with approved ECS status the following apply:

a) In circumstances where a **child** is placed in a day care program because the location is the best place to implement the **IPP** for the **child**, the fees only for the education component portion of the day may be claimed from PUF. The education component should reflect a typical education schedule

b) Costs for childcare are not eligible to be claimed under PUF.

9. **School jurisdictions** may appeal program unit funding decisions by contacting the Director of the Special Programs Branch.

REFERENCES

ECS Program Unit Funding: A Handbook for ECS Operators

RENTAL FEE

A rental fee of $100 a month for each existing approved portable rental will be deducted from the allocation amount due to an **ECS operator**.

CRITERIA

1. New requests for portable classrooms not longer be considered. Existing agreements for portable classrooms leased from Alberta Infrastructure will continue as required.

2. The rental fee of $100 per month for existing approval rentals will continue to be deducted from payments. **ECS operators** who begin their program prior to the 15th of the month or end their program after the 1st of the month will be deducted the monthly rental fee for the portable. No monthly fee will be deducted for **ECS operators** beginning programs on the 15th of the month or thereafter or ending their programs before the 15th of the month. The 7 percent Goods and Services Tax (GST) will be applied to the monthly fee.

PROCEDURES, DOCUMENTATION AND REPORTING

1. When a **school jurisdiction** assumes responsibility for a private **ECS program** that had been operating in an Alberta Infrastructure ECS portable before it ceased operations, the **school jurisdiction** will be given the first opportunity to purchase the portable at a nominal rate, subject to Ministerial approval. If the **board** is not interested in acquiring the ECS portable, Alberta Infrastructure will make the necessary arrangements for disposition of the portable.

2. For **school jurisdictions** that are presently using Alberta Infrastructure ECS portables, the following procedures are in effect:

   a) Alberta Infrastructure will continue with the leases under the current agreements until the portable is no longer suitable for the program or until such time as the cost of repair and maintenance can no longer be justified. The portable will then be disposed of by Alberta Infrastructure; or
   b) If the portable is in good repair the **school jurisdiction** will be given an opportunity to purchase the portable at a nominal rate, subject to the approval of the Minister of Infrastructure.

3. **School jurisdictions** will need to apply under the current Capital Funding Plan if space is required to replace the ECS portable.

REFERENCE

School Capital Manual, Alberta Infrastructure, April, 2002

New

FUNDING IN TRANSITION

To begin moving toward the jurisdiction profile allocation model and providing maximum flexibility to **school jurisdictions** to meet the needs of all of their students, some program funding areas have been combined into a category called Funding in Transition. This funding is determined based on the criteria outlined in the following pages and the applicable funding rates for 2003-2004. **School jurisdictions** are not required to apply for these allocations. Alberta Learning will determine the amounts to which a **school jurisdiction** is entitled.

1. TEACHER ASSISTANT PROGRAM: A **school jurisdiction** will receive funds based on its current year September 30 **funded student** enrolment in grades 1 through 6.

2. EARLY LITERACY: A **school jurisdiction** will receive funds based on its current year September 30 **funded student** enrolment in grades 1 and 2 and the September 30 ECS **child** enrolment.

3. TECHNOLOGY INTEGRATION: A **school jurisdiction** will receive funds based on its **frozen funded head count** for 2003 - 2004.

4. TEACHER SALARY ENHANCEMENT (TSE): A **school jurisdiction** will receive funds for the 2003 – 2004 school year in an amount equal to what it received in the 2002 – 2003 school year.

5. SPARSITY AND DISTANCE FUNDING

   A. SPARSITY

      i) A **school jurisdiction** will receive a sparsity allocation for a maximum sparsity factor of up to 3.0, calculated as follows:

SPARSITY = ALLOCATION (Sparsity Factor – 0.25) X Number of **funded students** in population centres less than 2000 X Sparsity rate

ii) Explanatory Criteria:

a) To recognize the dispersion of students for a francophone authority, the area of each francophone education region will be determined by assigning a 302 square mile attendance area for each school it operates.

b) The following factors qualify a **school jurisdiction** for the sparsity allocation:

- The geographical area, in square miles, of a **school jurisdiction** divided by the number of **funded students** has to be greater than 0.25 and less than or equal to 3.0.

OR

- If the number of **funded students** is greater than 6,000 and the number of rural students is greater than 25 percent but less than 50 percent, the area divided by the number of **funded students** has to be greater than 0.07 and less than or equal to 3.0;

AND

- A **school jurisdiction** that serves 2,000 or more **funded students** uses the number of **funded students** that attend **schools** in population centres of less than 2,000.

- Phase In: For **schools** located in population centres greater than 2,000, the sparsity rate will be lowered by $1.00 per extra person in the calculation for those schools only.
- A **school jurisdiction** that serves fewer than 2,000 **funded students** uses the number of **funded students** that attend **schools** in population centres of less than 5,000.
- Phase In: For **schools** located in population centres greater than 5,000, the sparsity rate will be lowered by $1.00 per extra person in the calculation for those **schools** only.
- Phase In: The sparsity rate will be reduced by $1.00 for each **funded student** over the 2,000 **funded student** base.

EXAMPLE CALCULATIONS:

a) A **school jurisdiction** serving fewer than 2,000 **funded students** may receive funding for students in all **schools** located in population centres less than 5,000.

-	**Funded students**	1,980
-	**Funded students** attending **schools** in population centres of less than 5,000	1,015
-	Area	3,798 square miles
-	Sparsity rate	$560

Calculation:

Sparsity factor = 3,798 ÷ 1,980 = 1.918

Sparsity funding = (1.918 - .25) X 1,015 X $560
= $948,091

b) A **school jurisdiction** serving more than 2,000 **funded students** may receive funding for students in all schools located in population centres less than 2,000.

-	**Funded students**		3,467
-	**Funded students** attending **schools** in population centres of less than 2,000		
	School A	960}	2,052
	School B	1,092}	
-	Area		3,798 square miles
-	Sparsity rate		$560

Calculation:

Sparsity factor = 3,798 ÷ 3,467 = 1.095

Sparsity funding = (1.095 - .25) X 2,052 X $560
= $971,006

c) If a **school jurisdiction** serves more than 2,000 **funded students**, it may include schools using the 5,000 population centre criteria provided they reduce the jurisdiction sparsity rate by $1.00 for every **funded student** over 2,000.

-	**Funded students**	2,089
-	**Funded students** attending **schools** in population centres of less than 5,000	1,275
-	Area	1,825 square miles
-	Sparsity rate	$560

Calculation:

Sparsity factor = 1,825 ÷ 2,089 = .874

Sparsity funding = (.874 - .25) X 1,275 X ($560 - (2,089-2,000))
= $374,728

d) If a **school jurisdiction** has a **school** in a population centre which is over the population threshold, it may include that **school** provided they reduce the sparsity rate, for that **school** only, by $1.00 for each person above the population threshold.

Sparsity funding using a sample jurisdiction serving more than 2,000 **funded students**, but with **schools** in population centres over the population threshold of 2,000 would be calculated as follows:

-	**Funded students**	2,015
-	**Funded students** attending **schools** in population centres of less than 5,000	1,015

-	**Funded students** attending a **school** in a population centre of 2,030	600
-	Area	578 square miles
-	Sparsity rate	$560

Calculation:

Sparsity factor = 578 ÷ 2,015 = .287

Sparsity funding = (.287 - .25) X 1,015 X $560
= $21,031

PLUS

Sparsity funding = (.287 - .25) X 600 X ($560 - (2,030 - 2,000))
= $11,766

Total Funding = $21,031 + $11,766 = $32,797

In this example, the jurisdiction receives the total funding under the original formula, as well as additional funding at a reduced rate for the school in the population centre over the population threshold.

e) A **school jurisdiction** serving more than 6,000 students, of which more than 25 percent but less than 50 percent are **funded students** attending schools in population centres of less than 2,000, will receive sparsity funding if its sparsity factor, determined by dividing the area of the **school jurisdiction** by the number of **funded students**, is greater than 0.07.

Sparsity funding for a **school jurisdiction** serving more than 6,000 students of which 31percent are rural students is calculated as follows:

-	**Funded students**	13,662
-	**Funded students** attending schools in population centres of less than 2,000	4,239
-	Area	1,934 square miles

Calculation:

Sparsity factor = 1,934 ÷ 13,663 = 0.142

Sparsity funding = (0.142 – 0.07) x 4,239 x $560
= $170,916

B. DISTANCE

i) A **school jurisdiction** will receive a distance allocation calculated as follows:

DISTANCE ALLOCATION	=	(Distance - 40) Jurisdiction central office to urban centre	X	Number of **funded students** in the jurisdiction	X	**School Jurisdiction** Distance rate
		+				
		(Distance - 25) Jurisdiction central office to school	X	Number of **funded students** in the school	X	School Distance rate

ii) Explanatory Criteria:

- The central administration office of a **school jurisdiction** is located at least 40 kilometres from one of the following urban centres: Calgary, Edmonton, Lethbridge, Medicine Hat, or Red Deer.

- Funding is provided to **school jurisdictions** for the distance between the central administration office and the **schools** they serve.

- The following school categories are excluded from the school distance calculation portion of the formula: Outreach schools/programs, Hutterite Colony schools, Home Education programs, and **institutions**.

- The higher than average living costs recognized for the City of Fort McMurray are addressed using a distance rate for **school jurisdictions** in Fort McMurray that is three times the distance rate set by Alberta Learning.

- The location of a **school jurisdiction's** central administration office is that reported to the Governance and Program Delivery Branch and included in the current Alberta School Jurisdiction List.

- Distance is measured from the location of a **school jurisdiction's** central administration office to the centre of the nearest of following cities: Edmonton, Calgary, Red Deer, Lethbridge or Medicine Hat. The most direct route via primary **highway** as shown on the current Travel Alberta Road Map is used. If the **school jurisdiction's** central administration office is not located on a primary **highway**, then the shortest route on a secondary road is used.

- Distance funding is paid for the kilometres after the first 40 kilometres between a **school jurisdiction's** central administration office and the closest of the urban centres listed. Funding is calculated for each **school** whose distance between their central administration office and the **school** is more than

25 kilometres. Distance is measured from the location of a central administration office to each **school** by the most direct route on a traveled road or **highway**.

EXAMPLE CALCULATION:

Using this formula, distance funding for a sample **school jurisdiction** would be calculated as follows:

Distance between **school jurisdiction,** central office and urban centre	200	km
School jurisdiction funded students	2,100	
School jurisdiction distance rate	$ .44	
Distance between **school jurisdiction,** central office and **school**	99.4	km
Funded students at the **school**	100	
School distance rate	$ .31	

Calculation

Distance Funding From Central Office

= (200 - 40) X 2,100 X $ .44
= 160 X 2,100 X $ .44
= $147,840

Distance Funding For Each **School**

= (99.4 - 25) X 100 X $ .31
= 74.4 X 100 X $ .31
= $2,306

Total Distance Funding

Distance from Central Office =	$147,840
Distance from Each **School** =	$ 2,306
Total	$150,146

6. GROWTH AND DENSITY

Funding is based on two different growth formulas:

a) **School jurisdictions** experiencing enrolment growth at the jurisdiction level during the year in grades 1 through 10 will receive additional funding based on their March 1 count.

Funding will be based on the net increase of students in grades 1 to 10 between the September 30 and the March 1 count.

Funding will be calculated at 50% of the total amount which the jurisdiction would be eligible for had the student been enrolled for a full year (i.e. funding for Basic Instruction, estimated Plant Operations and Maintenance, and Transportation).

NOTE:

- Enrolment declines will not cause funding adjustments
- Growth in grades 11 and 12 is accommodated through the credit enrolment funding system

b) **School jurisdictions** with individual schools that experience year-to-year enrolment growth of more than 8% over the last two consecutive school years will be provided an amount of $541 (in addition to (a) above) for each **funded student** over the 8% rate. The September 30 count of each of the years is used to determine the growth.

7. SYSTEM ADMINISTRATION FUNDING

a) Funding for **school jurisdiction** system administration is based on a percentage of the funding a **school jurisdiction** receives for:

i) the instruction of students in **ECS** to grade 12; and
ii) student transportation and boarding.
iii) Plant Operations and Maintenance funding that will be provided by Alberta Infrastructure.

The calculation for System Administration excludes any one-time funding that is provided in a year.

b) The percentage used in the calculation of system administration funding, is based on a total FTE student count for Grades 1 to 12 not including **home education students** and adult students. **School jurisdictions**:

i) with fewer than 2000 FTE students receive 6 percent;
ii) with more than 6000 FTE students receive 4 percent; and
iii) with between 2000 and 6000 FTE students receive between 6 and 4 percent on a sliding scale.

c) The following are not included in the calculation of system administration funding:

- Technology Integration Funding
- Regional Consortia Funding
- Alberta Initiative for School Improvement
- Student Health Initiative Partnership Funding
- Teacher Salary Enhancement Funding
- SuperNet Funding

d) **School jurisdictions** completely funded by Alberta Learning with a mandate to educate resident students or educate students with constitutional rights, are guaranteed a minimum of $336,600 administration funding. Charter schools are guaranteed a minimum of $51,000 in administration funding.

e) A **school jurisdiction** is not required to apply for system administration funding; Alberta Learning determines a **school jurisdiction's** eligible funding using information as described in item 7(a).

f) System administration funding is calculated as follows:

$$\text{System administration funding} = \left(\text{* Instruction funding ECS -12} + \text{Estimate of plant operations and maintenance funding} + \text{Student transportation funding} \right) \text{X} \ \text{Percent based on enrolment}$$

Using this formula, system administration funding for a sample **school jurisdiction** would be calculated as follows:

FTE Students	3500
Instruction funding (ECS to 12)	$14,000,000
Plant operations and maintenance funding (estimated)	$1,700,000
Student transportation funding	$1,500,000

Calculation:

i) Percentage (using sliding scale)
= 6% - [(3500-2000) x 2% ÷ 4000]
= 6% - [1500 x 2% ÷ 4000]
= 6% - (.0075 x 100)
= 6% - .75%
= 5.25%

ii) System administration funding
= ($14,000,000 + $1,700,000 + $1,500,000) X .0525
= $17,200,000 X .0525
= $903,000

* Instruction Funding includes the following:

Basic Instruction
Outreach Program
Severe Disabilities
English as a Second Language
Enhanced Opportunity
First Nations, Métis, and Inuit
Institutional Programs
Regional Educational Consulting Services
Sparsity and Distance
Teacher Assistants Program
Early Literacy
Learning Resources Credit
Resources for the Classroom
Home Education
Growth and Density
ECS Basic Instruction
ECS Mild/Moderate, Gifted and Talented
ECS Program Enhancement Project
ECS Program Unit
ECS Early Literacy

ALLOCATION FORMULA

Severe Disabilities Allocation = [Number of **funded students** with Cognitive, Multiple, Severe Physical/Medical disability, deafness or blindness (per profile) X Applicable Funding Rate] +

[Number of **funded students** with Severe Emotional/Behavioural Disability (per profile) X Applicable Funding Rate]

ALLOCATION CRITERIA

1. Funding will be provided to **school jurisdictions** based on the established severe disabilities profile for the jurisdiction that includes historical data of the numbers of **students with severe disabilities**, provincial patterns of overall student enrolment growth and projections for growth of the numbers of students with severe disabilities.

2. **Charter schools** are not funded on a severe disabilities profile basis. They are funded on a per eligible **student with severe disabilities** basis.

PROCEDURES, DOCUMENTATION AND REPORTING

1. The **individualized program plan (IPP)** must be supported by appropriate medical, psychiatric, psychological or other professional documentation for each **student with a severe disability** identified and attending a **school** of the jurisdiction.

Revised

2. **School jurisdictions** will use the severe disabilities categories/codes and related definitions/criteria outlined in the Glossary of Terms, the *Standards for Special Education* and the *Handbook for Identification and Review of Students with Severe Disabilities* to determine a student's disabling condition for severe disabilities identification purposes.

3. **School jurisdictions** must report **students with severe disabilities** as of September 30, and submit to Information Services by October 3.

ADDITIONAL INFORMATION

1. Students who are registered with one **school jurisdiction** on September 30 and who then move to another **school jurisdiction** after September 30, are not eligible for additional funding because the severe disabilities profiles include accommodation for student movement over the course of the year. This would also apply to students who move from an **institution** (i.e., a hospital program, young offender centre, etc) or from out of province to a **school jurisdiction** after September 30.

2. A **school jurisdiction** that directs a student with severe disabilities to another **school authority** is responsible for all educational program costs that are not covered by funding provided by Alberta Learning to the **school authority** providing the student's program.

3. **Students with a severe disability** who transfer after September 30 from a **school jurisdiction** to a **funded private school** will be funded through pro-rated funding, based on the March 1 count, provided by Alberta Learning to the **funded private school**. **School jurisdictions** will not be required to transfer funding to the **funded private school**.

4. For **students with severe disabilities** registered with a **funded private school** on September 30, who transfer to a **school jurisdiction** after September 30, severe disabilities funding will be transferred by the **funded private school** to the **school jurisdiction** on a pro-rated basis, based on a 10-month program year. (i.e., for a student who will be in the **school jurisdiction** for 6 months, 6/10 of severe disabilities funding would be transferred from the **funded private school**.)

5. **School jurisdictions** may request an audit of their severe disabilities profile if there are significant increases or decreases to the number of students with severe disabilities by writing to the Director, Special Programs Branch by November 1.

REFERENCES

Standards for Special Education

Handbook for the Identification and Review of Students with Severe Disabilities

SECTION 1.11
ENGLISH AS A SECOND LANGUAGE FUNDING

ALLOCATION FORMULA

English as a Second Language Allocation	=	Eligible ESL **funded students** grades 1 to 12	X	Funding Rate

ALLOCATION CRITERIA

1. A **school jurisdiction** with students who have insufficient fluency in English to achieve grade level expectations in English Language Arts may receive English as a Second Language (ESL) funding for each eligible **funded student** in grades 1 to 12.

Revised

2. Students eligible for ESL funding:

   a) come from homes in which the primary spoken language is not English;
   b) speak minimal English or are non-English speaking.

PROCEDURES, DOCUMENTATION AND REPORTING

1. Student registration information for grades 1–12 as of September 30 of the current **school** year that is submitted to the Information Services Branch by October 3.

Revised

2. To receive ESL funding **school jurisdictions** should continue to code ESL students in the appropriate categories: Canadian-born (303), Foreign-born (301), or unfunded (302).

ADDITIONAL INFORMATION

1. **Funded students** enrolled in home education, **blended programs**, **outreach programs** or **on-line programs** are not eligible for funding under this section.

ALLOCATION FORMULA

Revised 1. Funding is provided only for projects already approved by Alberta Learning. No new projects will be approved for 2003-04. This is a one-year extension that is being provided during the transition to the renewed Funding Framework. Future funding to meet the needs of students who are disadvantaged because of social and/or economic conditions will be addressed within the new framework.

ALLOCATION CRITERIA

Revised 1. Funding for the four urban **school jurisdictions** in Calgary and Edmonton has been approved for 2000/2001 to 2002/2003 and will be extended for 2003/2004.

2. Funding for **school jurisdictions** other than the four urban jurisdictions in Calgary and Edmonton has been approved for 2001/2002 to 2003/2004.

ALLOCATION FORMULA

The amount of funding is based on the number of First Nations, Métis and Inuit students served by the **school jurisdiction** according to a scale determined by Alberta Learning.

ALLOCATION CRITERIA

1. A **school jurisdiction** may receive First Nations, Métis, and Inuit Education (FNMI) funding for approved programs that provide direct services for First Nations, Métis and Inuit students. Programs must be approved for funding by the Director, Aboriginal Services Branch.

PROCEDURES, DOCUMENTATION AND REPORTING

1. Program approval must be obtained on an annual basis.

Revised

2. All **school jurisdictions** currently receiving funding for FNMI programs must submit First Nations, Métis and Inuit Education Program Plans for the 2003-2004 to the Director, Aboriginal Services Branch by March 31st of the school year, using criteria from the First Nations, Métis and Inuit Education Program Guide.

ADDITIONAL INFORMATION

1. Guidelines and procedures for submission and approval of future program plans will be provided during the 2003-2004 school year.

REFERENCES

Policy, Regulations and Forms Manual

First Nations, Métis and Inuit Education Program Guide

The First Nation, Métis and Inuit Education Policy Framework

Guide to School Board Planning and Results Reporting

ALLOCATION FORMULA

Learning Resources Credit	=	Number of registered students in grades 1 –12 (less than 20 years of age)	X	per student credit rate

ALLOCATION CRITERIA

1. A learning resources credit at the Learning Resources Centre (LRC) is provided to **school jurisdictions** and band operated and Federal Government administered First Nations **schools** to assist in purchasing learning resources from the LRC.

Revised

2. The learning resources credit is used by **school jurisdictions** to help pay for learning resources purchased from the LRC. The learning resources credit would cover 25 percent of an order while the **school jurisdiction** pays for 75 percent.
   Note: **School jurisdictions** may use their Resources for the Classroom funding to cover their 75% portion (see section 1.15 for more details).

3. The LRC will charge the regular selling price after the credit amount is fully utilized.

4. Unless requested otherwise by the **school jurisdiction**, the learning resources credit will be applied automatically against purchase orders until the full credit amount is used. **School jurisdictions** that do not want a particular purchase order charged against the credit should clearly state, "DO NOT APPLY THE LEARNING RESOURCES CREDIT" on the purchase order.

PROCEDURES, DOCUMENTATION AND REPORTING

1. A **school jurisdiction** is not required to apply for the learning resources credit; Alberta Learning will determine the credit using enrolment information in grades 1 to 12 (who are under the age of 20) on September 30. To receive the credit, students must be registered by the **school jurisdiction** with the Information Services Branch.

ADDITIONAL INFORMATION

Revised

1. The 2003/2004 Learning Resources Credit is valid for April 1, 2003 to March 31, 2004.

2. If requested, LRC will assist **school jurisdictions** in managing locally determined credit ceilings on an individual **school** basis.

3. **School jurisdictions** can call the LRC or visit the LRC website at www.lrc.learning.gov.ab.ca to inquire about the status of their credit.

NEW SECTION

ALLOCATION FORMULA

Resources for the Classroom Funding = Number of **funded students** grades 1-12 X Funding Rate

The number of **funded students** will be that at September 30, 2002.

ALLOCATION CRITERIA

1. A one-time allocation of funding to assist **school jurisdictions**, (not including band operated and Federal Government administered First Nations schools) in purchasing learning resources for the classroom from the Learning Resources Centre (LRC).
2. Resources for the Classroom funding will be provided through the LRC to **school jurisdictions** for purchasing classroom learning resources from the LRC.
3. The Resources for the Classroom funding will be used by **school jurisdictions** to pay for learning resources from the LRC. This funding may be combined with the learning resources credit (Section 1.14) to cover 100% of the cost of the purchase.
4. After the jurisdiction has fully utilized their Resources for the Classroom funding, they will be charged the regular selling price less any remaining learning resources credit.
5. Unless requested otherwise by the **school jurisdiction**, the Resources for the Classroom funding will be applied automatically against purchase orders until the full allocated amount is used. **School jurisdictions** that do not want a particular purchase order charged against the funding should clearly state, "DO NOT APPLY THE RESOURCES FOR THE CLASSROOM FUNDING" on the purchase order.

PROCEDURES, DOCUMENTATION AND REPORTING

1. An eligible **school jurisdiction** is not required to apply for the Resources for the Classroom funding; Alberta Learning determines the **school jurisdiction** funding allocation automatically using the September 30, 2002 **funded student** enrolment count.

ADDITIONAL INFORMATION

1. The 2003/2004 Resources for the Classroom funding is valid for April 1, 2003 to March 31, 2004.
2. If requested, LRC will assist **school jurisdictions** in managing locally determined funding ceilings on an individual **school** basis.
3. **School jurisdictions** can call the LRC or visit the LRC website at www.lrc.learning.gov.ab.ca to inquire about the status of their funding.

ALLOCATION FORMULA

Boarding Allocation = Number of **funded students** eligible for Boarding x Funding Rate

ALLOCATION CRITERIA

Revised

1. A **school jurisdiction** can receive boarding funding for eligible **funded students** whose **parent(s)** reside in the **school jurisdiction** if a student is directed by the **board** to attend a **school** that requires the student to live away from home.

2. Funding for boarding is not paid to a **school jurisdiction** for a **resident student** who is:

   a) attending a **funded private school** or a **school** of a jurisdiction where the student has been placed by a **parent** without the direction of the **school jurisdiction**, or

   b) attending a **private school** outside Alberta when the education program has not been previously approved by the **Minister**, or

   c) maintained in a temporary residence to attend extra-curricular courses.

PROCEDURES, DOCUMENTATION AND REPORTING

1. Payment is made on the basis of the electronic form, “Special Transportation and Boarding” submitted to School Reporting Branch by November 30.

2. The **count date** is September 30.

ALLOCATION FORMULA

1. A **board** of a **rural district** which is providing transportation services may receive the following rural transportation funding for each transportation year:

a) Block Funding Support

i)
$$\text{Density Support} = \left[\begin{array}{l}\text{Applicable Annual} \\ \text{Density Rate per} \\ \textbf{Eligible Passenger/} \\ \textbf{Eligible} \\ \textbf{Transported ECS} \\ \textbf{Child}\end{array} \times \left\{ \begin{array}{l}\text{Applicable} \\ \text{Weighting} \\ \text{Factor}\end{array} \times \begin{array}{l}\textbf{Eligible} \\ \textbf{Passenger/} \\ \textbf{Eligible} \\ \textbf{Transported} \\ \textbf{ECS Child}\end{array} \right\} \right]$$

ii)
$$\text{Distance Support} = \left[\begin{array}{l}\text{Applicable} \\ \text{Annual Distance} \\ \text{Rate}\end{array} \times \begin{array}{l}\text{Applicable Eligible} \\ \text{Transportation Distance (kms)} \\ \text{for each Eligible Passenger}\end{array} \right]$$

Total Block Funding support is the aggregate of the amounts calculated for each **eligible passenger** and **eligible transported ECS child** in i) and ii) above.

b) Inter-School Transportation Support

Support to a **school jurisdiction** for a bus providing inter-school transportation to each group of 66 weighted **eligible passengers**, or portion thereof, is calculated as follows:

$$\text{Inter-school Support} = \left[\begin{array}{l}\text{Daily Kms of Inter-} \\ \text{School Transportation} \\ \text{for the bus}\end{array} \times \begin{array}{l}\text{Number of Days of Inter-} \\ \text{School Transportation in the} \\ \text{school year for the bus}\end{array} \right] \times \begin{array}{l}\text{Support} \\ \text{Rate}\end{array}$$

The total annual support for inter-school transportation is the aggregate of the amounts calculated for each bus providing inter-school transportation.

c) Bus Modification or Purchase Allowance to Accommodate Wheelchair Passengers

Refer to Section 1.18, Special Transportation.

ALLOCATION CRITERIA

1. Where a **board** of a **rural district** has under its jurisdiction or transports an **eligible passenger** or **eligible transported ECS child** of a city, town, village or hamlet with a

population greater than 10,000, the **board** may be funded for each **eligible passenger** and for each **eligible transported ECS child** residing within those boundaries. The rate applicable is the rate for Urban Transportation. These students cannot be included as **eligible passengers** under the Rural Transportation formula. A **board** of a **rural district** claiming both urban and rural transportation must have received prior approval from the **Minister**. Applications for approval should be submitted to the School Reporting Branch.

Where a **board** of a **rural district** has under its jurisdiction a city, town, village or hamlet with a population less than 10,000 and transports an **eligible passenger** or **eligible transported ECS child** residing within those boundaries to a **school** of a program listed under Consideration # 3 of this Section outside those boundaries, the **board** may be reimbursed for each **eligible passenger** and for each transported ECS **child** under the Rural Transportation formula. These students may not be included as **eligible passengers** under the Urban Transportation formula.

Where the net support for student transportation of a **board** increases or decreases in excess of 3% as a result of a community population reaching 10,000, the adjustment will be determined for that jurisdiction.

Where the net support for student transportation of a rural **board** decreases in excess of 3% as a result of movement between **density** grid columns, an adjustment may be determined for that jurisdiction.

2. Block Funding:

a) If a student who is not a **resident student** of the **board** accesses that **board's** transportation system in accordance with the *Student Transportation Regulation*, section 4, at a point 2.4 kilometres or more from the **school** attended, and where there is not a **transportation agreement** or an **education services agreement** between the **resident board** and the **board** providing transportation, the **board** providing transportation service may claim only the **density** support for that student.

b) If a **board** extends its transportation service outside its jurisdiction boundaries to provide service to a non-resident student not covered by a **transportation agreement** or an **education services agreement** between the **resident board** and the **board** providing transportation, the **board** providing transportation service is not eligible for transportation funding for that student.

c) If a **resident student** of a **board** is transported by the **board** to a **school** of the **parent's** choice outside the attendance area or transportation service area (as defined in the *Student Transportation Regulation)* of the **designated school** for that student, only **density** support and **distance** support to the nearest **school** may be claimed for that student if he or she is an **eligible passenger.** Where a **board** has adopted over-lapping **school** attendance or transportation service areas, **density** support and **distance** support to the **school** nearest the student's residence may be claimed.

d) In the case of a **school jurisdiction** which is providing transportation in only a portion of its area, for those **eligible passengers** residing in the jurisdiction but beyond the transportation service area and are transported through co-operative bussing arrangements with other **school authorities**, area and **density** for the **school jurisdiction** shall be calculated on the basis of the area directly served by the **school jurisdiction** and the **eligible passengers** residing in that area.

e) If a **board** is providing transportation services under an agreement with another **board** and the two **boards** are not sharing a co-terminus area, the area of the **board** receiving transportation services may be added to the transporting **board's** area for determining the **density** rating for the transporting **board**.

f) Block funding under this section is available only to **boards** operating student transportation systems. A **board** accessing transportation services for its **resident students** through **educational services agreements** or **transportation agreements** is not eligible for block funding under this section.

g) Notwithstanding subsection (f), a **board** transporting an **eligible passenger** of another **board** under a **transportation agreement** to the **designated school** of that **resident board**, who resides outside the transportation service area of the **resident board** and accesses the bus route of the **board**, may claim the **density** and the **distance** support from the **designated school** to the point where the student accesses the bus route for that **school**. The **resident board** may claim only the **distance** support from the residence of the student to the point where the student accesses the bus route for the **designated school**, at the **distance** rate received by the transporting **board**.

h) **Students with disabilities** transported by a **school bus** on a special route for **students with disabilities** may be claimed under this Section using a **weighting factor** of 3 or under Section 1.18, whichever is most advantageous to the **board.**

3. ECS Transportation:

a) A **school jurisdiction** that claims ECS Regular Transportation funding must transport, or make arrangements for the transport of **children** attending **ECS programs** at a service level that is consistent with the transportation of students under Section 51 (1) of the *School Act*.

b) A **school jurisdiction** providing transportation to and from an **ECS program** may charge the **parent** of a **child** a fee for the transportation service. The total amount of fees charged to ECS **parents** for transportation services shall not exceed the total cost of the provision of ECS transportation services less the ECS transportation funding received from Alberta Learning.

c) Each **eligible transported ECS child** transported will be counted as 1.0 weighted passenger in determining block funding support.

d) A **school jurisdiction** may claim **eligible transported ECS children** it transports to programs operated by another **board**, a **private school**, or a **private ECS operator** as **eligible passengers** if the **board** has an agreement with the other **board**, **private school**, or **private ECS operator**.

4. Inter-school Transportation

a) Inter-school transportation for students whose courses of study require a special facility or equipment not available in the **school** they attend, may be claimed for support provided that:

- The course of study is prescribed or approved by the **Minister** under the *School Act*, Section 39;

- The course of study requires a special facility or equipment not available at the **school** of daily attendance for those students; and

- The course of study requires the use of the special facility or equipment for at least 18 consecutive weeks.

b) Work Experience programs and intermittent bussing to such activities as swimming programs are **not** eligible for inter-school transportation support.

5. Funding shall not be paid under this section for a **funded student** or an ECS **child** who is counted under the Special Transportation funding (Section 1.18).

Revised

6. Transportation support shall be paid from the student's residence to the **school** in the attendance area or transportation service area in which the student resides unless the student is directed by the **board** to attend another **school** for the following:

- **Alternative french language programs** (including French immersion and bilingual programs) and **other language immersion programs**
- Integrated Occupational Program (IOP);
- Special Education programs to meet the needs of students with severe disabilities;
- High school CTS programs offered to an advanced level in a specialized classroom facility where the course curriculum requires the instructor to have the technical trade qualification (Courses include Mechanics, Fabrication Studies, Cosmetology and Construction Technology);

7. Students transported by a **board** to an **on-line program** or an **outreach program** accessing 50 percent or more of their educational program at a **school** of the **board** or to a **blended program** at a **school** of the **board** may be claimed as **eligible passengers** under Rural Transportation.

PROCEDURES, DOCUMENTATION AND REPORTING

1. Rural **school jurisdictions** are required to submit electronically a Rural Transportation claim form to the School Reporting Branch by November 30. Payment

is made on the basis of the submitted information, the rural transportation funding rates, and in accordance with the *School Act* and the *Student Transportation Regulation, A.R. 250/98; amended A.R. 197/2000.*

2. The **count date** for Rural Transportation funding is September 30. Special consideration for the **count date** may be given to **school jurisdictions** experiencing exceptional growth in transportation needs.

3. The **effective transportation area** of a **school jurisdiction** for purposes of calculating **density** support is the **effective transportation area** of the **school jurisdiction** as of September 30 in a given year.

Revised

4. **School jurisdictions** are required to retain the following information on file for a minimum of three years and make it available for review by Alberta Learning upon request. Items a), b), c), and d) should be kept in an electronic file and made available to Alberta Learning either electronically or on a computer disc.

   a) Maps of overall attendance areas and transportation service areas;

   b) Location of each student's residence (street addresses in towns, villages and hamlets, and where available in rural areas, and legal land descriptions in all other rural areas);

   c) Maps of individual bus routes;

   d) A list of names of **eligible transported ECS children** transported by bus and the names and grades of **eligible passengers;**

   e) Records of **route distance** verified by an official(s) of the **school jurisdiction**;

   f) Copies of **educational services agreements**;

   g) Copies of **transportation agreements** with **school boards, private schools, charter schools** and **private ECS operators**;

   h) Copies of current vehicle inspection certificates issued under the *Safety Traffic Act*; and

   i) Copies of contracts with:
      (i) Operators of contracted busses for regular transportation;
      (ii) **Parents** providing transportation indicating the amount to be paid; and
      (iii) Agents providing special transportation for **students with disabilities**.

ADDITIONAL INFORMATION

1. **First Nations students** shall not be counted as **eligible passengers**.

ALLOCATION FORMULA

1. a) Special Transportation:

$$\begin{array}{l}\text{Special}\\\text{Transportation}\\\text{Allocation}\end{array} = \left[\begin{array}{l}\text{Number of }\textbf{students}\\\textbf{with disabilities}\\\text{transported (see}\\\text{Allocation Criteria \#1)}\end{array} \times \begin{array}{l}\text{Applicable special rate}\\\text{(urban or rural) per}\\\textbf{student with a disability}\end{array}\right] +$$

$$\left[\left\{\begin{array}{l}\text{Number of ECS }\textbf{children}\\\textbf{with disabilities}\\\text{transported (see}\\\text{Allocation Criteria \#1)}\end{array} \times \begin{array}{l}\text{Number of}\\\text{program}\\\text{operation days}\end{array}\right\} \times \begin{array}{l}\text{Rate per}\\\text{round trip}\end{array}\right]$$

b) Weekend Transportation:

$$\begin{array}{l}\text{Weekend}\\\text{Transportation}\\\text{Allocation}\end{array} = \left[\begin{array}{l}\text{Number of }\textbf{students with}\\\textbf{disabilities}\text{ transported on a}\\\text{weekend}\end{array} \times \begin{array}{l}\text{Weekend}\\\text{Transportation}\\\text{Rate}\end{array}\right]$$

c) In-home Program Transportation:
(see the Glossary of Terms for the definition of **in-home program**)

$$\begin{array}{l}\text{In-home}\\\text{Transportation}\\\text{Allocation}\end{array} = \left[\begin{array}{l}\text{Number of scheduled}\\\text{in-home visits}\\\text{(maximum 36)}\end{array} \times \begin{array}{l}\text{Funding Rate}\\\text{per Round trip}\end{array}\right]$$

d) Bus Modification or Purchase Allowance to Accommodate Wheelchair Passengers:

Funding is provided to **school jurisdictions** for up to 100 percent of approved costs for the purchase of a wheelchair lift or ramp to be installed on a new or used bus if prior written approval is given by the Director, School Reporting Branch. Applications should be submitted to the School Reporting Branch.

ALLOCATION CRITERIA

Revised

1. Urban or rural **school jurisdictions** may receive special transportation funding for **students** and **children with disabilities** who cannot, because of the severity of their disability, use the transportation described in Sections 1.17, 1.19, 1.20 or 2.6 of this

manual. The metro urban school jurisdictions (Edmonton and Calgary) are not eligible for funding under this section.

2. Special transportation funding is also provided for **children with special needs** who, because of their young age, are not able to ride regular transportation.

Revised This includes **children with a severe disability** (ages 2.5 to 4.5), and **children with a mild or moderate disability** and **children** who are gifted and talented (ages 3.5 to 4.5).

3. Program or **school** location shall not be considered when determining eligibility for this funding.

4. Special transportation funding is provided for **children with disabilities** and **students with disabilities** who require special transportation between their residences or boarding places (boarding refers only to **students with disabilities**) and:

   a) the **school** of a **school jurisdiction**;
   b) a **funded private school**;
   c) a **private ECS operator**; or
   d) a program at an **institution** operated and/or funded by Alberta Learning:
      (i) which the **student with disabilities** has been directed to attend by the **school jurisdiction** because the **school jurisdiction** does not operate a suitable program, or
      (ii) which is the closest suitable and available program offered.

5. To claim special transportation funding for a **student with disabilities** attending a **funded private school,** the **school jurisdiction** must have directed the student to attend that **school**.

6. Weekend Transportation

   a) Weekend transportation support is paid to **school jurisdictions** when **students with disabilities** are transported on weekends between their permanent residences and their boarding places by their **parents** and are attending:

      (i) the **school** of a **school jurisdiction**; or
      (ii) a **funded private school**.

   b) Funding for weekend transportation is paid to the **school jurisdiction** of the **district** or **division** in which the **parent** of the **student with a disability** resides.

7. In-Home Program Transportation (ECS children only):

   a) For the purposes of this section, in-home transportation means transportation for each scheduled visit made by a teacher, a child development specialist, or a teacher assistant to the home of a **child with a disability** enrolled an **in-home program**.

b) In-home transportation funding will be paid according to the number of home visits to a maximum of:

   i) 36 visits for a program unit **child**
   ii) 22 visits for a **child with a mild or moderate disability**

New 8. Transportation costs incurred for field trips or in-program activities cannot be claimed under this funding. These costs may be claimed for **children with severe disabilities** under Program Unit Funding.

PROCEDURES, DOCUMENTATION AND REPORTING

1. Urban and rural **school jurisdictions** are required to submit electronically a Special Transportation and Boarding claim form to the School Reporting Branch by November 30. Payment is made on the basis of the submitted information, the funding rates and in accordance with the *School Act* and the *Student Transportation Regulation, A.R. 250/98; amended A.R. 197/2000.*

2. The **count date** for special transportation funding is September 30. Special consideration on **count dates** may be given to **school jurisdictions** experiencing exceptional growth in transportation needs.

Revised 3. **School jurisdictions** are required to retain the following information on file for a minimum of three years and make it available for review by Alberta Learning upon request. Items a), b), and c) should be kept in an electronic file and be made available to Alberta Learning either electronically or on computer disc.

   a) Maps of overall attendance areas and transportation service areas;
   b) Location of each student's residence (street addresses in towns, villages and hamlets, and where available in rural areas, and legal land descriptions in all other rural areas);
   c) Maps of individual bus routes;
   d) Records of **route distance** verified by an official(s) of the **school jurisdiction**;
   e) Copies of **education service agreements;**
   f) Copies of **transportation agreements** with **school boards, private schools, charter schools** and **private ECS operators;**
   g) Copies of current vehicle inspection certificates issued under the *Highway Traffic Act*; and
   h) Copies of contracts with:
      (i) written **transportation agreements** with agents, organizations, **parents** or other persons.
      (ii) Records showing the amount to be paid on behalf of **students with disabilities** requiring special transportation.

ALLOCATION FORMULA

1. **Urban District** transportation:

$$\begin{array}{l}\text{Urban}\\\text{Transportation}\\\text{Allocation}\end{array} = \left[\left\{\begin{array}{l}\textbf{Eligible}\\\textbf{passengers}\\\text{Gr. 1-12}\end{array} + \begin{array}{l}\textbf{Eligible}\\\textbf{transported}\\\textbf{ECS children}\end{array}\right\} \times \begin{array}{l}\text{Urban}\\\text{Transportation}\\\text{Funding Rate}\end{array}\right]$$

The funding an urban jurisdiction receives for rural students will be calculated using the Rural Transportation formula. These students cannot be included as **eligible passengers** under the Urban Transportation formula.

2. Francophone Authorities within an Urban Area:

Transportation funding to a Francophone Education Program recognizes the dispersion of students for a Francophone Authority.

$$\begin{array}{l}\text{Francophone}\\\text{Urban}\\\text{Transportation}\\\text{Allocation}\end{array} = \left[\left\{\begin{array}{l}\text{Eligible}\\\text{francophone}\\\text{students}\\\text{transported}\\\text{Gr. 1 - 12}\end{array} + \begin{array}{l}\text{Eligible}\\\text{francophone}\\\text{ECS }\textbf{children}\\\text{transported}\end{array}\right\} \times \begin{array}{l}\text{3.5}\\\text{(weighting}\\\text{factor)}\end{array}\right] \times \begin{array}{l}\text{Urban}\\\text{Transportation}\\\text{Funding Rate}\end{array}$$

ALLOCATION CRITERIA

1. A **school jurisdiction** that is an **urban district** or **division** may receive urban transportation funding for each **eligible passenger** and each **eligible transported ECS child.**

2. An **urban district** may receive funding for a student who is not a **resident student** of the **board** that accesses the **board's** transportation system in accordance with the *Student Transportation Regulation*, section 4, at a point that is 2.4 kilometres or more from the **school** in which the student could be enrolled.

3. If an **urban district** extends its transportation service outside its jurisdiction boundaries to provide service to a non-resident student not covered by a **transportation agreement** or an **educational services agreement** between the **resident board** and the **board** providing transportation, the **board** providing transportation service is not eligible for transportation funding for that student.

4. An **urban district** that claims ECS regular transportation funding must transport or make arrangements for the transportation of **eligible transported ECS children** at a service level that is consistent with the transportation of students under Section 51 (1) of the *School Act*.

5. An **urban district** providing transportation to and from an **ECS program** may charge the **parent** of a **child** a fee for the transportation service. The total amount of the transportation fee charged to **parents** shall not exceed the total cost of the provision of ECS transportation services less the ECS transportation funding the **school board** receives from Alberta Learning.

6. An **eligible passenger** or an **eligible transported ECS child** can only be counted once under this section.

7. Funding is not provided for transporting students or ECS **children** between **schools**.

8. Where a **board** has adopted over-lapping **school** attendance or transportation service areas, eligibility for funding under this section is determined by the **distance** to the **school** nearest the student's residence.

9. If a **resident student** of an **urban district** is enrolled in a **school** of the **parent's** choice outside the attendance area or transportation service area (as defined in the *Student Transportation Regulation*) in which the student resides, eligibility for transportation support is determined by the **distance** to the **school** nearest the student's residence.

10. If a **board** of an **urban district** or **division** transports students residing less than 2.4 km from the **school** within the attendance area or transportation service area (as defined in the *Student Transportation Regulation)* in which the students reside, to a **school** other than the **school** within the attendance area or transportation service area in which the students reside because the enrolment of that **school** is equal to or greater than its rated capacity, then the number of students so transported that is equal to or greater than the number of students not resident within the attendance area or transportation service area and enrolled in that **school** shall be deducted from the number of **eligible passengers** claimed for funding under this section.

11. Where **board** of an **urban district** has a rural area under its jurisdiction and is providing transportation services in that area, the **school jurisdiction** may receive funding under the Rural Transportation formula for each **eligible passenger** and each **eligible transported ECS child** residing in the rural area. A **school jurisdiction** claiming both urban and rural transportation must have received prior approval from the **Minister**. Requests for approval should be submitted to the School Reporting Branch.

12. To recognize the dispersion of students for a Francophone authority within an **urban district** a weighted factor of 3.5 will be used for urban Francophone students being transported.

13. Funding shall not be paid under this section for a **funded student** or an **ECS child** who is counted under the Special Transportation funding (Section 1.18).

Revised

14. Eligible **distance** is determined to be the **distance** from the student's residence to the nearest **school** in the attendance area or transportation service area in which the student resides unless the student is directed by the **board** to attend another **school** for any of the following reasons:
    - **Alternative French Language Programs** (includes French Immersion and bilingual programs) and **Other Language Immersion Programs**;
    - Integrated Occupational Program (IOP);
    - Special Education programs to meet the needs of students with severe disabilities;
    - High school CTS programs offered to an advanced level in a specialized classroom facility where the course curriculum requires the instructor to have the technical trade qualification (Courses include Mechanics, Fabrication Studies, Cosmetology and Construction Technology);

15. Students transported by a **board** to an **on-line program** or an **outreach program** accessing 50 percent or more of their educational program at a **school** of the **board** or to a **blended program** at a **school** of the **board** may be claimed as **eligible passengers** under Urban Transportation.

PROCEDURES, DOCUMENTATION AND REPORTING

1. **Urban districts** are required to submit electronically an Urban Transportation claims form to the School Reporting Branch by November 30. Payment is made on the basis of this submitted information, the Urban Transportation funding rates, and in accordance with the *School Act* and the *Student Transportation Regulation, A.R. 250/98; amended A.R. 197/2000.*

2. The **count date** for urban transportation funding is September 30. Special consideration for the **count date** may be given to **school jurisdictions** experiencing exceptional growth in transportation needs.

3. Urban transportation funding is calculated by multiplying the number of **eligible passengers** and **eligible transported ECS children** by the urban transportation rate.

4. The funding an urban jurisdiction receives for rural students will be calculated using the Rural Transportation formula. These students cannot be included as **eligible passengers** under the Urban Transportation formula.

Revised

5. **Urban districts** are required to retain the following information on file for a minimum of three years and make it available for review by Alberta Learning upon request. Items a), b), c), and d) should be kept in an electronic file and made available to Alberta Learning either electronically or on a computer disc.
   a) maps of overall attendance areas and transportation service areas;
   b) location of each student's residence (street addresses in towns, villages and hamlets);

c) maps of individual bus routes;
d) a list of names of **eligible transported ECS children** transported by bus and the names and grades of **eligible passengers**;
e) records of **route distance** verified by an official(s) of the **school jurisdiction**;
f) copies of **education service agreements**;
g) copies of **transportation agreements** with **school boards, private schools, charter schools** and **private ECS operators**;
h) copies of current vehicle inspection certificates issued under the *Highway Traffic Act*; and
i) copies of contracts with:
    i) operators of contracted **school busses** for regular transportation;
    ii) **parents** providing transportation showing amounts paid.

ADDITIONAL INFORMATION

1. **First Nations students** as shall not be counted as **eligible passengers**.

ALLOCATION FORMULA

1a) The number of **expected eligible passengers** to be included in the metro urban transportation block funding formula is determined as follows:

(Residential Area X 75.80)	**+**	**[Funded Students and Children (ECS - 12) X 0.7300]**	**=**	
LESS:				
0.75 (# of ECS-Elem. Schools)	**X**	**Lesser of:** **Average ECS-Elem. School size in the jurisdiction and average school size for the 4 jurisdictions.**	**=**	
0.400 (# of Jr. High Schools)	**X**	**Lesser of:** **Average Jr. High School size in the jurisdiction and average school size for the 4 jurisdictions.**	**=**	
0.250 (# of Sr. High Schools)	**X**	**Lesser of:** **Average Sr. High School size in the jurisdiction and average school size for the 4 jurisdictions.**	**=**	
		Expected Eligible Passengers	**=**	

1b) The metro urban transportation block funding a metro urban district may receive is determined as follows:

Metro Urban Transportation Funding = (Expected Eligible Passengers X Metro Urban Transportation Block Rate) + ([0.8 X Severely Disabled Students (1-12)] (per Severe Disabilities profile) X Special Transportation Rate)

1c) ECS **children** will be included in the Metro Urban Transportation Block funding formula with the following adjustments to the coefficients/benchmarks:

- The average elementary **school** size will be adjusted to include ECS **children**,
- The walk percentage for elementary schools will be reduced from 0.80 to 0.75 for ECS-elementary schools, and
- The eligible enrolment co-efficient will be reduced from 0.735 to 0.730.

ALLOCATION CRITERIA

1. Edmonton School District No. 7, Edmonton Catholic Separate School District No. 7, Calgary School District No. 19 and Calgary RCSSD No. 1 school districts are eligible for metro urban transportation block funding.

2. Funding is determined using a **school** size "benchmark". The benchmark is the lesser of two values: the jurisdiction's average **school** size and the average **school** size in the four jurisdictions. A benchmark is determined for each of the three levels (elementary, junior high and senior high).

3. The number of **expected eligible passengers** is calculated using the following factors:

   a) the benchmark for each level;
   b) the number of **schools** by level;
   c) the number of **funded students** and ECS **children;**
   d) the residential area;
   e) the number of **funded students with severe disabilities** based on the jurisdiction profile.

4. The following conditions are used in determining the number of **schools** servicing the three **school** levels in the public and separate school **boards** in Edmonton and Calgary:

   a) **Institutions,** outreach schools, Designated Home Education Schools, and other special **schools** (**schools** where the majority of the **funded students** are special needs students) as determined by School Finance are excluded.

   b) An ECS-elementary school with fewer than 75 students is not counted.

   c) An ECS-elementary school with 75 or more students and 3 or fewer grades will be counted as half an ECS-elementary school.

   d) A junior high school with fewer than 75 students is not counted.

   e) A senior high school with fewer than 200 students is not counted.

   f) A senior high school with fewer than 200 but with 75 or more students is counted as a junior high school.

5. The formula used to calculate metro urban transportation block funding contains the number of **schools** by level, the residential area, and the number of **funded students** attending **schools** within the jurisdiction.

6. The **school jurisdictions** in Calgary and Edmonton which are transporting **eligible transported ECS children** to **board**-operated programs will be eligible for transportation funding under the Metro Urban Transportation Block funding. The ECS enrolments will be included in the formula.

7. ECS **children with disabilities** who require special transportation will be funded outside of the metro urban block formula at the ECS Special Transportation rate. Transportation funding for **children with disabilities** should be claimed using form 01AL2.6 – ECS Transportation Application. ECS **children** with a severe disability who qualify for Program Unit Funding (PUF) cannot be included in the count of students with severe disabilities in the Metro Urban Transportation formula.

8. **School jurisdictions** receiving Metro Urban Transportation funding must transport or make arrangements for the transport of **children** attending **ECS programs** at a service level that is consistent with the transportation of students under Section 51 (1) of the *School Act*.

9. When a metro urban district is accessing the Metro Urban Transportation Block funding and has under its jurisdiction an area included in another municipality, the metro urban district may be reimbursed for each **eligible passenger** transported to **school** using the rural transportation formula, or, if the municipality is a city outside of Calgary or Edmonton, for each **eligible passenger** using the urban transportation formula. A metro urban district currently claiming under this section and seeking to claim either rural transportation (Section 1.18) funding, or urban transportation (Section 1.20) funding, must have approval from the **Minister**. Requests for approval should be submitted to the School Reporting Branch.

10. A metro urban district, which has made an arrangement with a **charter school** to transport the **charter school's** students, may include the **funded students** attending the **charter school** for the purposes of calculating the number of **expected eligible passengers**. The **charter school** is not counted by the **school jurisdiction** in determining the number of **schools**.

PROCEDURES, DOCUMENTATION AND REPORTING

Metro urban districts are required to keep the following information on file and available for review by Alberta Learning:

a) Current **school jurisdiction** transportation policy,

b) The number of **eligible passengers** and **eligible transported ECS children**, their names, **school(s)** attended and their programs,

c) The names of **students** who are not attending their local **school**, and the reasons, and

d) Relevant detailed transportation costs for a particular school year.

ADDITIONAL INFORMATION

1. A **school jurisdiction** providing transportation to and from an **ECS program** may charge the **parent** of a **child** a fee for the transportation service. The total amount of the transportation fee charged to **parents** shall not exceed the total cost of the provision of ECS transportation services less the ECS transportation funding the **school jurisdiction** receives from Alberta Learning.

2. The basic block formula will continue for the 2003-2004 school year.

ALLOCATION FORMULA

Revised

The formulas and requirements for funding that apply to **school jurisdictions** under Part 1 and Part 7 also apply to **charter schools**; however, **charter schools** are not eligible to claim funding for Home Education, Building Quality and Restoration Program (BQRP), debt retirement, and **school** capital projects.

ALLOCATION CRITERIA

1. Funds are provided to **charter boards** for each **funded student** enrolled in an established **charter school** whose **charter** has been approved by the **Minister**. The **charter school** must comply with the terms of its **charter** and all applicable provincial legislation, regulation and policies.

2. A **charter school** can make an agreement with a **school jurisdiction** for student transportation. Under such an agreement, the local **school jurisdiction** may claim funding for the transportation of **charter school** students as if they were previously students in the **school jurisdiction**.

Revised

3. If a **charter school** is unable to reach an agreement with a **school jurisdiction** for the transportation of their urban students, the **charter school** may claim student transportation funding for these students transported at the urban student transportation rate under the Urban Transportation formula.

Revised

4. **Charter schools** who are unable to reach an agreement with a **school jurisdiction** for the transportation of their rural students, may claim, with respect to each **eligible passenger** resident in a **rural district** or **division,** the average regular rural transportation allocation per **eligible passenger** transported for which the **board** of that **rural district** or **division** is eligible.

5. The student count used by a **charter school** for funding purposes must not include students counted by another **school authority**. It is the responsibility of the **charter school** to ensure that a student has not been counted by another **school authority** in the current school year.

PROCEDURES, DOCUMENTATION AND REPORTING

1. To claim funding and receive payment from Alberta Learning, **charter schools** must meet the same requirements as **school jurisdictions** as outlined under Part 1 and Part 8 of this Manual.

2. **Charter schools** must be incorporated under the *Societies Act*, or by a company registered under Part 9 of the *Companies Act*.

3. A **charter board** must appoint an auditor and submit a budget report form and audited financial statements in accordance with Sections 145 to 152 of the *School Act*, reflecting the financial operation of the **charter school**.

4. A **charter school** must keep in force insurance and bonds that are required by provincial legislation.

5. A **charter school** must carry a blanket fidelity bond for the **charter school** and all employees in an amount acceptable to the **Minister**. Agents refer to this as a "commercial blanket bond".

6. **Charter boards** who are intending to cease the operation of a **charter school** or transfer its operation to another **board** must receive approval from the **Minister** and conclude operations in accordance with the terms of the **charter** and *Charter School Regulation*.

ADDITIONAL INFORMATION

1. Funding may be advanced on a one-time basis to any newly approved **charter school**.

REFERENCES

Charter School Handbook

Charter School Policy 1.1.1

Charter School Regulation AR 212/2002

PURPOSE

This funding provides **Early Childhood Services (ECS) children** with a basic **ECS program** to help prepare them for entry into grade 1 and provide a foundation for later success.

CONDITIONS

Revised

1. Basic instruction funding is provided to **ECS operators** for each eligible **child** enrolled in an **ECS program** which provides access to at least 475 hours of instruction.

   Note: Some modification to this requirement is allowed for children with special needs (mild, moderate, or severe) who because of their special needs or young age cannot be accommodated by a 475-hour program (ie. they may require more or less hours). Also some special needs children, either because of their disability or young age, may benefit from an **in-home program** or from a combined program involving school hours and home visits. A combined program must have a minimum of four home visits to qualify for funding. See definition of **in-home program** in the Glossary of Terms for more details. Any other exceptions to this requirement must be submitted in writing to the Director of School Finance.

Revised

2. An approved **ECS operator** must be prepared to accept and organize programming for all eligible **children** for whom programming is requested, including **children with special needs**.

3. A **child** referred to in Section 30(1)(a) of the *School Act* is not a resident or non-resident student of a **board**, therefore, approved **ECS operators** shall not use the residency or non-residency of the **parent** of a **child** in a district or **division** to:

   a) deny a **child** access to the program; or

   b) differentiate as to the fees charged for the program.

Revised

4. The ECS count must not include any **child** counted by another **ECS operator** for funding purposes in the school year. An eligible **child** can only be claimed by one **ECS operator** per year. The **ECS operator** claiming the **child** is responsible for ensuring the **child** was not claimed by another **ECS operator** in the current school year.

   However, if a **child** attended more than one **ECS program** on September 30 and a resolution cannot be reached as to which **ECS operator** should count the **child**, then the Basic Instruction funding will be split accordingly. For example, a **child** may be enrolled in a morning program with one **ECS operator** and also enrolled in an afternoon program with another **ECS operator**. Neither operator may be aware of the duplicate enrolment until Alberta Learning has identified the enrolment conflict. If at that time a resolution cannot be reached as to which **ECS operator** should count the **child** then the Basic Instruction funding is split accordingly. Revised

5. **ECS operators** are eligible for one year of Basic Instruction funding for regular ECS **children**. Children must be at least 4 years 6 months of age and less than 6 years of age on September 1. The minimum age may vary depending on the school entrance age policy of the **school jurisdiction** the child will enter. Alberta Learning will not provide more than one year of funding for a regular ECS **child**.

New 6. An ECS **child with a disability** may qualify for more than one year of funding. See definition of **child** in the Glossary of Terms.

7. Alberta Learning provides funding for a basic 475 hour **ECS program** which includes support for instructional salaries and benefits, learning resources, furnishings and equipment. **ECS operators** may not charge a fee for services provided `within the basic 475 hour program.

8. An **ECS operator** may charge a fee to **parents** of ECS **children** in a basic 475 hour program to offset non-instructional costs such as supplies, snacks and field trips.

9. **ECS operators** that offer an **ECS program** with more than 475 hours may charge a reasonable fee to cover the cost of the additional hours.

10. All individuals age 5 years and 6 months or older, but less than 6 years of age on Sept. 1 are counted as **funded students** (rather than as **children**) if they are eligible to enter grade 1 under the **school** entrance age policy of a **school jurisdiction**. The exceptions to this are:

    a) if the **child** has spent less than the number of years in the program for which he/she is eligible for funding, i.e., received less than three years program unit funding; or
    b) if the **child** has not enrolled in an **ECS Program** prior to this age; or
    c) if the **child** has been assessed as **developmentally immature**. This **child** is not eligible for special needs funding.

    In these circumstances, when in the opinion of the **school jurisdiction** and the **parent**, an **ECS Program** is appropriate, the individual is counted as a **child** under ECS.

11. All individuals who are age 6 years or older, but less than 7 years on Sept. 1 are counted as **funded students** except individuals who are in an **ECS program** and are:

    a) **developmentally immature** or
    b) entering an **ECS program** for the first time.

    These individuals (a and b) are counted as **children**.

12. An individual who is eligible to proceed to grade 1, but has been identified as **developmentally immature** and whose program plan involves both ECS and grade 1 instruction may be counted either as a **child** or as a **funded student**.

13. Individuals aged 6 to 7 years old, who require another year of ECS and who have been assessed as having special needs (mild, moderate or severe) must be counted as **funded students**. If an individual is **developmentally immature**, they are not considered to have special needs. If the individual does have special needs then they are to be counted as a **funded student**.

14. Under no circumstances can an individual be counted as both a **funded student** and as a **child** in the same school year.

REQUIREMENTS

1. **New Private ECS Operators**

   The form "Notice of Intent to Operate" will be sent to new **private ECS operators** by their respective Zone Services Branch upon request. New **private ECS operators** will be required to provide a Certificate of Incorporation under the *Societies Act*, or be registered as a non-profit company under Part 9 of the *Companies Act*, or be incorporated as a non-profit corporation under an Act of the Legislature. Also required is documented proof that the ECS facility meets all applicable municipal and provincial public health, safety and building standards requirements, and a signed declaration that the program will operate in accordance with the *School Act*, Section 30 .

2. **Existing Private ECS Operators**

   The form "Notice of Intent to Operate" will be sent to **private ECS operators** by their respective Zone Services Branch in June. **Private ECS operators** may be required to provide documentation such as the current status of their Certificate of Incorporation and proof that their facility meets fire and health safety standards.

3. **Private ECS operators** must complete and submit the "Notice of Intent to Operate" form to their respective Zone Services Branch by July 31. The information on this form initiates the first payment of the school year.

4. **Private schools** that operate **ECS Programs** must complete and submit by May 31 a **Private School** "Annual Operational Plan". The Notice of Intent for ECS operations within **private schools** is incorporated into the Annual Operation Plan.

5. All **private ECS operators** must advise their respective Zone Services Branch within one week of any changes which occur in facility, society, programs, or teaching staff during the school year. **Funded private schools** must send a list of any teaching staff changes to their respective Zone Services Branch by September 19.

6. A **private ECS operator** must maintain a blanket fidelity bond with respect to the **private ECS operator** for employees and board members in the amount of $50,000 or the accumulated surplus plus 40 percent of Alberta Learning funding for the program year (the value of the first payment in the first month of operation), whichever is less.

7. Funding for ECS basic instruction is made on the basis of **child** registration information submitted to Information Services.

8. Funding for ECS basic instruction is calculated by multiplying the number of eligible ECS **children** by the rate for ECS basic instruction.

9. For **ECS programs** beginning in September, the **count date** is September 30 and the information must be submitted by October 3 to Information Services.

10. For **ECS programs** beginning after September 30 the count will be taken as of the last **operating day** in the month in which the **ECS program** begins. The information must be submitted within three weeks of that day to Information Services.

11. If any adjustment is required to the enrolment data reported to Information Services, please complete the "Add, Change, Delete" Form (form 03AL1.2c) and submit to School Finance.

CONSIDERATIONS

1. **ECS operators** who are intending to cease operation of an **ECS Program** should refer to the policy under the Appendices Section of this Manual.

2. Alberta Learning has an agreement with the Canadian Copyright Licensing Agency (Cancopy). Most **schools** in the province are covered in the license. Alberta Learning makes the payment for the license on behalf of all participating **private ECS operators**. The cost of the license, plus GST, is recovered from **private ECS operators** on a full-time equivalent student basis. It is up to the individual **private ECS operators** to apply for any GST rebate from the Government of Canada.

3. Edulink, a multi-functioned data exchange software tool, has been created to help **private ECS operators** and Alberta Learning simplify current data management and exchange processes.

   Alberta Learning will deduct 35¢ plus GST per **child** on behalf of all **private ECS operators** using Edulink. This deduction will be made in September and based on the prior year frozen funded **child** count for ECS. The deduction will be reflected on the October funding statement. It is up to the individual **private ECS operators** to apply for any GST rebate from the Government of Canada.

   Alberta Learning will forward the maintenance fee of $195,000 to Edmonton Catholic **Schools**, the host **board**. This funding will provide for the annual maintenance budget, but it is not sufficient enough to pay for significant changes to the software.

REFERENCES

Advisory Manual on Early Childhood Service (1996)

Kindergarten Program Statement

Early Childhood Services Policy 1.1.3

Early Childhood Services Regulation AR 31/2002

PURPOSE

Rented portable classrooms may be provided to **Early Childhood Services (ECS) programs** when other space is unavailable.

CONDITION

1. New requests for portable classrooms will no longer be considered. Existing agreements for portable classrooms leased from Alberta Infrastructure will continue as required.

REQUIREMENTS

1. The rental fee of $100 per month for existing approval rentals will continue to be deducted from payments. **ECS operators** who begin their program prior to the 15th of the month or end their program after the 1st of the month will be deducted the monthly rental fee for the portable. No monthly fee will be deducted for **ECS operators** beginning programs on the 15th of the month or thereafter or ending their programs before the 15th of the month. The 7 percent Goods and Services Tax (GST) will be applied to the monthly fee.

2. When a **school jurisdiction** assumes responsibility for a private **ECS program** that had been operating in an Alberta Infrastructure ECS portable before it ceased operations, the **school jurisdiction** will be given the first opportunity to purchase the portable at a nominal rate, subject to Ministerial approval. If the **board** is not interested in acquiring the ECS portable, Alberta Infrastructure will make the necessary arrangements for disposition of the portable.

REFERENCE

School Capital Manual, Alberta Infrastructure, April, 2002

PURPOSE

This funding enables **Early Childhood Services (ECS) operators** to provide **ECS programs** designed to meet the educational needs of **children with mild or moderate disabilities** and **children** who are gifted and talented.

CONDITIONS

1. Funding is paid to an **ECS operator** for each eligible **child with a mild or moderate disability** or who is gifted and talented. **Children with mild or moderate disabilities** and **children** who are gifted and talented are eligible for a maximum of two years funding. To be eligible for funding, **children** must be at least 3 years 6 months of age on September 1 and less than 6 years of age on September 1.

Revised

2. A **child with a mild or moderate disability** who is at least 5 years 6 months of age and less than 6 years of age, and who is eligible for grade one (under the **school** entrance policy) may be eligible for mild-moderate ECS funding if the **school jurisdiction**, **parent**, and **ECS operator** agree that an ECS program is the most appropriate placement. See the definition of **child** in the Glossary of Terms.

REQUIREMENTS

1. Special needs funding is based upon **child** registration information submitted to Information Services by October 3. Eligible **children** must be properly coded using exceptional student Code 30 for **children with mild or moderate disabilities** or code 80 for **children** who are gifted and talented and grants program Code 500 on the electronic SIS registration file or Alberta Learning Student Registration Form in order to receive this funding.

2. Recent assessment documentation to support each **child's** designation and identification as a **child with a mild or moderate disability** or a **child** who is gifted and talented must be kept on file by the **ECS operator**.

Revised

3. An **individualized program plan (IPP)** for each **child with a mild or moderate disability** or a **child** who is gifted and talented is to be developed, implemented and regularly revised and kept on file by the **ECS operator**. Documentation must also be on file which identifies how the funding was utilized to provide additional educational supports and/or services to the **child**. Development and implementation of the IPP must be carried out under the direction of the teacher.

4. For **children** who have been assessed as having a mild or moderate disability or identified as being gifted and talented after the September 30 count has been submitted, but who were enrolled in the program on September 30, an "Add, Change, Delete" form (form 03AL1.2c) must be completed in order to receive this funding.

5. **ECS operators** receiving this funding must offer educationally based programs that meet the needs of **children with mild or moderate disabilities** or **children** who are gifted and talented.

Revised

CONSIDERATIONS

1. Funding for **children with mild or moderate disabilities** or **children** who are gifted and talented is calculated by multiplying the number of **children with mild or moderate disabilities** or **children** who are gifted and talented (exceptional student Code 30 or 80 and grants program Code 500) on September 30 by the mild/moderate rate.

2. Programs serving **children with mild or moderate disabilities** and **children** who are gifted and talented may be monitored by Alberta Learning.

REFERENCES

Advisory Manual on Early Childhood Service for Incorporated Non-Profit Societies or Private Schools

Early Childhood Services Policy 1.1.3

Guide to Education: ECS – Grade 12

PURPOSE

This funding provides for special programs and services to meet the learner requirements of **children** who are economically or socially disadvantaged.

CONDITIONS

Revised

1. **Private ECS operators** that were approved for Program Enhancement Project (PEP) funding in 2002-2003 will be eligible to continue to receive this funding for 2003-2004. No new applications will be accepted for 2003-2004.

2. **Designated Special Education ECS Programs** are not eligible for PEP funding

CONSIDERATIONS

1. **ECS operators** may use PEP funding to provide additional hours of ECS instruction and compensatory programming aimed at raising the preparedness and performance of **children** to the level of **children** in regular programs. The compensatory programming should enhance the **children's** potential for coping and succeeding in **school**.

2. The coordinated delivery of interventions will be enhanced by collaboration with community-based government and private agencies, local **schools** and families. Specific attention should be given to the transition from ECS to grade 1.

UNDER REVIEW

PURPOSE

This funding provides for individual programs for **children with severe disabilities** to meet their educational needs.

CONDITIONS

1. Program Unit Funding (PUF) may be paid to a **private ECS operator** for each eligible **child with a severe disability** for a maximum of three years.

2. The funding amount paid will be the lesser of the program unit ceiling, the approved budget total, and the actual cost.

3. To be eligible for funding, a **child with a severe disability** must be at least 2 years 6 months of age and less than 6 years of age on September 1. **Private ECS operators** should plan the **child's** program so that the last year of PUF is the year prior to the **child's** entry into grade 1.

Revised

4. **ECS operators** will use the categories/codes and related definitions/criteria outlined in **students/ECS children with severe disabilities** in the Glossary of Terms to determine a **child's** disabling condition for PUF eligibility purposes.

5. A **child** receiving program unit funding is not eligible for ECS mild/moderate funding.

6. An eligible **child** can be claimed by only one **ECS operator** at a time. The **ECS operator** claiming the **child** is responsible for ensuring the **child** is not claimed by another **ECS operator**.

7. Eligibility for PUF will be based on all of the following:

   a) a diagnosis of a disability/condition at the severe/profound level by qualified personnel (note: a diagnosis alone is not necessarily sufficient to qualify for funding);
   b) documentation/assessments of the **child's** current level of functioning in the learning environment;
   c) a current **individualized program plan (IPP)** which addresses the **child's** diagnosed needs; and
   d) the levels of support and services being provided to the **child**.

   To expedite the approval process, assessment information to support the eligibility of the **children** should be submitted with the PUF application. This information should include actual reports, summary information, or a format agreed upon with Alberta Learning. When an **ECS operator** is uncertain of a **child's** eligibility, the operator is.

encouraged to discuss the issues of the **child's** eligibility with Alberta Learning prior to making an application

REQUIREMENTS

1. Payment of program unit funding is based on the approval of a Program Unit Application form (Form 03AL2.5a). Applications may be submitted either on paper or electronically using the Program Unit Funding System (PUFS). Workshops on how to use PUFS will be held throughout the province in Fall 2003. A separate PUF application should be completed for each **school** that has **children** eligible for PUF. As part of the application, an individual budget must be submitted for each program unit listed on the application. The ECS operator should provide current assessment information to support the PUF application. The completed application, with original signatures, must be submitted to School Finance. The assessment information should be sent to the Special Programs Branch.

2. The following information pertaining to **children** receiving PUF must be kept on file by **private ECS operators** and made available to the Special Programs Branch on request:

   a) an **Individualized Program Plan (IPP)** must be developed, implemented and regularly revised for each **child**; and
   b) formal assessment documentation to support the severity of each **child's** special need (a current assessment report must be included with the PUF Application); and
   c) informal assessment documentation reflecting current performance levels; and
   d) plans and summaries of home visits conducted over the year; and
   e) current budget information.

3. The deadline for applications is January 1. **Private ECS operators** should plan and budget carefully for the school year as revisions will no longer be accepted. However, extenuating circumstances to this rule may be discussed with Alberta Learning personnel. Applications for **children** who are diagnosed or registered after January 1 will be accepted until May 1.

4. When a **child** leaves a program before the end date specified, a letter of notification must be submitted to the School Finance Branch outlining the following information:
   a) the **child's** program start date and end date; and
   b) an estimated cost of the **child's** program up to the time of departure. If no cost estimate is provided, the approved budget will be pro-rated based on the months the **child** was in attendance at the program.

   The original approved budget total and ceiling will then be reduced.

5. When a **child with a severe disability** moves from one **ECS operator** to another, a new PUF application based on the **IPP** must be submitted by the second operator prior to May 1 of the program year.

6. All **private ECS operators** must report actual expenditures in the schedule pertaining to Early Childhood Services Program Unit Expenditures in the Audited Financial Statements which are due November 30.

7. If a **child** has a medical condition/disability which has not changed significantly since the initial diagnosis and was previously approved by Alberta Learning, current documentation outlining assessments, treatment and current level of functioning may be sufficient to ensure continuation of PUF. This information should be kept on file and available for review by Alberta Learning.

   Private ECS operators must provide documentation to support continued PUF for previously eligible **children** with a severe communication disorder, a severe multiple disability (primarily involving language), or any other condition likely to change significantly as a result of intervention, maturation or changes within the **child's** environment. Documentation must include the following:

   - a statement from the appropriate professional that the **child** continues to demonstrate a severe disability;
   - description of the necessary supports and services the **child** requires as a result of the disability;
   - description of the impact of the disability on the **child's** ability to function within the ECS environment.

   It is the responsibility of the **private ECS operator** to ensure that all **children** claimed under PUF meet the eligibility criteria outlined. **ECS operators** who are uncertain about the eligibility of a **child** are encouraged to contact the Special Programs Branch. Special Programs Branch staff will provide confirmation of eligibility.

8. A **child's** program hours and/or home visits must meet the **child's** needs. If a combined program of **school** hours and home visits is provided, the **in-home program** must include a minimum of four in-home visits in order to be included in the ceiling calculation (see example of ceiling calculation). See the definition of **In-Home Program** in the Glossary of Terms.

9. To access the full ceiling amount, the program offered must be a full time program.
   A full-time program must provide either 800 hours of instructional programming for a **child** in a center based program or a minimum of 36 in-home visits for each **child** in an **in-home program** during the school year, or the equivalent combination of hours and visits.

10. 800 hours is the maximum number of hours that will be funded for ECS **children** receiving PUF. Summer programs are not eligible for PUF and should not be included as part of the 800 hour maximum.

    In some exceptional circumstances, for a **child's** last year of PUF, additional program hours beyond 800 hours may be approved, based on an individual **child's** needs. A written request explaining the reason for the additional program hours must be submitted with the PUF application for approval by the Special Programs Branch. This exception will be subject to the ceiling maximum.

11. PUF is supplemental to the Basic Instruction funding. It is intended to cover the additional educational program costs required to meet the **child's** severe special needs.

    When completing the budget for program unit costs, budget amounts should approximate anticipated costs. The following specifies the costs which may be included for PUF. Any exception to these costs should be discussed with Alberta Learning before submitting the application.

    a) Instruction

Revised

(i) Salaries, wages and employer's portion of benefits and expenditures applicable to teacher assistants directly involved in planning, implementing and evaluating the program for the **child(ren)** in the unit. The number of hours claimed here may exceed the **child's** program hours by up to 10 percent for each child within that program unit. Clustering and small group program delivery should be considered as alternatives to full-time direct one-to-one assistance.

Revised

(ii) Services Purchased – includes services of qualified personnel in the areas of speech therapy, occupational therapy, physiotherapy, mobility training, special education consultation, psychological and other services, and assessment costs for part or all of the program which are not provided free by public service agencies. Costs should be reasonable. Operators must keep records of all services purchased under PUF. All options regarding service delivery should be considered. Operators must ensure that all services purchased are relevant to the child's educational program and are in direct support of the goals and objectives included on the child's IPP.

Special Education Consultation is a service purchased by the **private ECS operator** to provide programming support for the ECS teacher. Examples of services provided under Special Education Consultation include IPP development and implementation, programming strategies, suggested resources and materials and support of the off-campus components of the program. Special education consultation is delivered by a certificated teacher with the appropriate training and experience. On-site Special Education consultation costs are additional costs to the **private ECS operator** that provide direct programming support. These costs will be subject to a maximum of $1,500 per **child** based on a full-time program. For programs less than 800 hours, the $1,500 maximum will be pro-rated based on the program hours and/or number of eligible home visits. For example, special education consultation costs for 475 hours and 6 home visits would be calculated as:

$$\$1{,}500 \times \left(\frac{475}{800} + \frac{6}{36}\right) = \$1{,}141.$$

Revised

Costs for special education administration may not be claimed in this category. These costs are more appropriately covered by the administration category or by basic instruction funding. Operators must keep records of costs and services associated with special educational consultation.

(iii) Supplies and materials - instructional supplies and materials which are particular to the **child's** program, and are in addition to supplies purchased with basic instruction funding. Costs in this area are usually in the $200 - $500 range per **child**. For costs over this range, please attach a list of supplies to the application. **ECS operators** are encouraged to maintain a resource inventory and an equipment loan pool.

b) **Parent** Inservice - costs for **parents** who attend in-province workshops, seminars, inservice and specialized training sessions specifically related to the **child's** program and designed to enhance the ability of **parent(s)**/guardian(s) to assist in the **child's** development. Costs in this category are usually in the $100 - $400 range per **child**.

c) Staff Inservice - costs for teachers and teacher assistants who attend workshops, inservice, special courses and seminars related to staff responsibilities in the **child's** program and in parental assistance. Costs in this category are usually in the $200 - $500 range per **child**. Personnel included in Services Purchased are not eligible for Staff Inservice.

d) Transportation

Funding for transportation of ECS **children** is available by separate application (using form 03AL2.6) through ECS Special Needs Transportation Funding (Section 2.7) and through ECS Regular Transportation Funding (Section 2.6). PUF will pay for any transportation costs not covered by these Transportation grants. In order to determine which transportation costs are covered by PUF, all transportation costs must be listed on the PUF budget, then all transportation revenues (from the above transportation grants) must be deducted from the transportation costs. The following descriptions indicate the types of transportation costs which can be claimed and which transportation grants are available. Note: transportation claims must be submitted to School Finance by November 30 and only **children** who were enrolled by September 30 are eligible.

i) Transportation to and from **school**: Transportation funding for these costs may be claimed under section 2.7 for a **child** who requires special transportation; e.g. handi-bus, when, because of the severity of his or her disability or because of the **child's** age, the **child** cannot ride regular transportation or be transported under section 2.6 by a regular bus. Transportation costs in excess of the funding paid under section 2.6 or 2.7 may be claimed as transportation costs under program unit funding;

ii) **In-Home Programs**: Transportation funding for these costs may be claimed under section 2.7 for each scheduled visit made by a teacher, a **child** development specialist or a teacher assistant to the home of a **child** enrolled in an ECS **in-home program**. Funding provided under section 2.7 is based on the number of home visits up to a maximum of 36 visits. Transportation costs in excess of the funding paid under section 2.7 may be claimed as transportation costs under program unit funding;

iii) Other - Field Trips: Transportation costs for this area may be claimed as transportation costs under program unit funding. Field trips claimed must be those provided in addition to field trips for the regular ECS class or for a **child** who, because of his/her disability, requires special transportation on a regularly scheduled field trip; and

iv) In-Program: Transportation costs for this area may be claimed as transportation costs under program unit funding. In-program transportation costs must be specified and must be for transportation of the **child** from one program to another program or agency as part of the **child's Individualized Program Plan (IPP)**.

e) Operation and Maintenance

Funding for this area is now provided under Section 2.10 – Plant Operations and Maintenance funding. Costs for this category may not be claimed on the PUF budget.

f) Administration

Funding for this area is now provided under Section 2.9 – ECS Administration funding. Costs for this category may not be claimed on the PUF budget.

g) Capital: Furniture and Equipment - expenditures for specialized furniture and equipment required to meet the special needs of the **child**, which are not available free or subsidized by another source.

Revised

i) For any major purchase, such as computer hardware, FM systems, etc., a written recommendation from an appropriate specialist is required indicating the necessity for the equipment. The letter from the specialist should specify the relevance of the equipment to the child's educational program and how it directly supports the goals and objectives of the child's IPP. The letter should also include projected costs of the capital equipment. This letter should be attached to the PUF application.

ii) Approval by the Special Programs Branch is required for all capital expenditures.

iii) Expenditures should not exceed 15 percent of the budget total.

iv) A specialized piece of furniture or equipment no longer used by the **child** remains the property of the **private ECS operator**, not of the **child** or **parents** of the **child**. If a **child** changes **schools** in Alberta but continues to have use for the specialized furniture or equipment, the furniture or equipment goes with the **child**.

v) Renovations to a building to be used for the benefit of all **children** in the instructional area are not eligible for support under this section. **School jurisdictions** receive funding for renovations through the Building Quality Restoration Program (BQRP).

vi) Administrative capital purchases cannot be claimed under this category.

12. **Designated Special Education ECS programs**.

These are ECS programs where at least 70% of ECS **children** enrolled have a severe disability. The following requirements apply for these programs:

a) Prior approval is required to qualify for this status;

b) Operators who qualify for this status may claim all education program costs except capital building costs;

c) A budget based on the total education program costs must be submitted on the program unit funding application budget page for **designated special education ECS programs**;

d) Operation & Maintenance costs: This would include costs associated with the operation and maintenance of the school facility and would also include rent costs;

e) Administration: Reasonable costs for administration of the **ECS program** may be claimed here. Costs in this area are typically in the 6% to 12% range. System Administration Funding revenues will be applied to these costs as per item (g).

f) Capital costs must meet the specific needs of a **child** or a group of **children** to be eligible. An itemized list of capital must be included with the application if costs are claimed in this category;

g) Alberta Learning will apply all applicable revenues to the total program costs (such as basic instruction funding, mild/moderate funding, Program Enhancement Project (PEP) funding, ECS transportation funding and other applicable revenues) to determine a net program cost total to which the program unit funding will apply;

h) **Designated special education ECS programs** must comply with all Conditions, Requirements and Considerations outlined in Section 2.5, Program Unit Funding, of the Funding Manual. These programs must also comply with the expectations outlined in the *Standards for Special Education* and the principles contained in Alberta Learning's *Kindergarten Statement (2000);*

i) Applications for new programs must be submitted as a proposal to the Director of the Special Programs Branch by June 1 for approval. To be considered for this designated status, the program must have operated for at least one year. Newly designated programs will be subject to program review within the first year. The proposal should contain the following information:

- a rationale for applying for status as a **designated special education ECS program** including the potential benefits to **children** with severe special needs and their families. The rationale should also explain why the program could not operate as a regular ECS program and should highlight how receiving the designated status will resolve those issues.
- an overview of the proposed program including population served, program format, service delivery model, support services provided, and a brief summary of the role descriptions of program staff.
- a proposed budget completed using form 03AL2.5a. This budget should outline all estimated expenditures and projected revenues; and

j) The status of approved **designated special education ECS programs** may be reviewed and withdrawn at any time by Alberta Learning.

CONSIDERATIONS

1. A **child with a severe disability** who:

   a) is at least 5 years 6 months but less than 6 years of age on September 1 of the **school** year in which s/he is counted; and
   b) is eligible to enter grade 1 under the **school** entrance age policy of a **school jurisdiction**; and
   c) has not spent 3 years in an **Early Childhood Services program**,

   may be eligible for PUF if, in the opinion of the **school jurisdiction, parent** and **private ECS operator,** an **ECS program** is the most appropriate placement for the **child**.

2. The calculation of the ceiling amount for a program unit with one child in it using examples of a centre-based program, an **in-home program** and a program based on a combination of centre hours and in-home visits is determined as follows:

Calculation of the ceiling for a centre-based program of 500 hours	Calculation of the ceiling for an in-home based program of 10 in-home visits	Calculation of the ceiling for a combined program based on 500 centre hours and 10 in-home visits
$\frac{500 \text{ hrs}}{800 \text{ hrs}} \times \$21,281$ = $13,301	$\frac{10 \text{ visits}}{36 \text{ visits}} \times \$21,281$ = $5,911	$\left(\frac{500}{800} + \frac{10}{36}\right) \times \$21,281$ = $19,212

Note: If the calculation results in a number higher than the ceiling amount then the ceiling would apply.

3. The maximum program unit rates should be viewed as ceilings only. Provincial averages indicate the cost of most programs to be less than $14,000 per **child.** Careful stewardship of funds by **private ECS operators** is integral to the PUF program.

4. The decision to cluster or group **children** into a program unit for programming purposes should be based on the educational needs of the **children** involved. However, it is expected that operators will cluster **children** with similar needs who receive services in the same setting and at the same time whenever possible.

5. For a program unit with more than one **child**, the ceiling is calculated as follows:
   - Choose the **child** with the highest combination of hours and/or home visits.

     Calculate the ceiling for this **child** as follows:

$$\left[\left\{\frac{\text{\# hours}}{800} + \frac{\text{\# visits}}{36}\right\} \times \quad \$21{,}281\right]$$

   - To this amount, add, for each additional **child** in the program unit as follows:

$$+ \quad \left[\left\{\frac{\text{\# hours}}{800} + \frac{\text{\# visits}}{36}\right\} \times \quad \$5{,}279\right]$$

   Example

   For a program unit (cluster) of three **children**, where:
   - **child** #1 has 500 hours and 10 home visits
   - **child** #2 has 400 hours, no home visits
   - **child** #3 has 600 hours and 4 home visits

   The ceiling is then calculated as follows:

$$\begin{array}{lrcr}
\left[\dfrac{500}{800} + \dfrac{10}{36}\right] \times & \$\,21{,}281 & = & \$19{,}212 \\
+\left[\dfrac{400}{800}\right] \quad \times & \$5{,}279 & = & \$2{,}640 \\
+\left[\dfrac{600}{800} + \dfrac{4}{36}\right] \times & \$\,5{,}279 & = & \underline{\$4{,}546} \\
= \quad \text{Total ceiling for the unit} & & & \$26{,}398
\end{array}$$

6. Funding ceilings will be adjusted when a **child** starts a program after December 31 or when a **child** leaves the program earlier than planned. In these situations, the ceiling will be the lesser of:
   a. a pro-rated ceiling amount of $2,128 per month for the number of months the program runs; or
   b. the ceiling amount based on the program hours and/or the # of home visits.

For example, the ceiling amount for a **child** in a four month program with 300 hours and 4 home visits would be calculated as follows:

Ceiling calculation for a 4 month program in a 10 month program year
Lesser of: a) $21,281 X 4/10 = $8,512 or b) $21,281 X (300/800 + 4/36) = $10,345 Ceiling amount is $8,512

7. For **ECS operators** who are providing a program for a **child** with a severe disability in the regular ECS classroom:

   The Basic Instruction funding, Part 2, Section 1, is paid on behalf of all **children** in an **ECS Program**. Basic Instruction funding is available for **children** with a severe disability who are as young as 2 years 6 months on September 1. This funding supports the day-to-day operating costs of the program, such as teacher salaries, rent, utilities, and supplies. Since these costs would be incurred whether or not a **child** with a severe disability was in the program, they should not be included in the program unit expenditures. Ordinarily, teachers' salaries should not be included as program unit costs because the basic instruction funding supports these costs.

8. For **ECS operators** contracting placement in a Day Care and for Day Cares with approved ECS status the following apply:
   a) In circumstances where a **child** is placed in a day care program because the location is the best place to implement the **IPP** for the **child**, the fees only for the education component portion of the day may be claimed from PUF. The education component should reflect a typical education schedule

   b) Costs for **child** care are not eligible to be claimed under PUF.

9. **ECS operators** may appeal program unit funding decisions by contacting the Director of the Special Programs Branch.

REFERENCES

ECS Program Unit Funding: A Handbook for ECS Operators

PURPOSE

This funding enables **private ECS operators** to provide transportation for ECS **children** to and from their **ECS program**.

CONDITIONS

1. **Children** who reside at least 2.4 kilometres from the **ECS program** in which they are enrolled will be eligible for transportation funding.

2. A **child with special needs** (mild, moderate or severe) who requires transportation to and from **school** (Condition #1 does not apply for these **children**) is eligible for this funding if they are able to ride regular transportation. If a claim is made under this section, no other transportation funding to and from the **ECS program** may be claimed.

3. Transportation costs incurred for field trips or other activities cannot be claimed under this funding. For **children with severe disabilities**, these costs can be claimed under the Program Unit Funding (PUF).

REQUIREMENTS

1. A **private ECS operator** that claims ECS regular transportation funding must transport, or make arrangements for the transportation of, **children** attending **ECS programs**.

2. If the transportation of **children** is not done by the **private ECS operator**, then a contract or signed agreement must be in place with the company or person(s) transporting the **children**.

3. To apply for regular ECS transportation funding, **private ECS operators** are required to submit to School Finance by November 30, Form 03AL2.6, **Early Childhood Services** Transportation application. **School jurisdictions** that provide transportation for an ECS **child** will claim the **child** as an **eligible transported ECS child** under rural transportation, urban transportation or metro urban transportation block. For further details please refer to Section 1.17, Rural Transportation; Section 1.19, Urban Transportation; and Section 1.20, Metro Urban Transportation Block.

4. For **ECS programs** beginning in September, the **count date** for transportation funding is September 30.

5. For ECS programs beginning after September 30, the **count date** for transportation will be the last **operating day** of the month in which the program begins. Form 03AL2.6 must be submitted to School Finance within three weeks of that date.

6. **ECS children** registered after the **count date** are not eligible for regular transportation funding.

CONSIDERATIONS

1. A **private ECS operator** may receive transportation funding for each **ECS child** eligible for transportation and transported by:

   i) a **school bus**;
   ii) a **public transit system**; or
   iii) a **parent** where the **private ECS operator** does not provide bus services.

2. **Private ECS operators** may enter into agreements with **school jurisdictions** for the transportation of **children** enrolled in their programs. Funding for these **children** will be claimed by the **school jurisdictions** providing the transportation service.

3. A **private ECS operator** providing transportation to and from an **ECS program** may charge the **parent** of a **child** a fee for the transportation service. The amount of the fee shall not exceed the total cost of the provision of ECS transportation services less the ECS transportation funding received from Alberta Learning.

4. Revised Regular transportation funding is calculated by multiplying the number of **eligible transported ECS children** by the regular transportation rate for **private ECS operators**.

SECTION 2.7
SPECIAL TRANSPORTATION FUNDING

PURPOSE

This funding is provided to **private ECS operators** and metro urban boards for the transportation of **children with disabilities** to and from an **ECS program** who can not be accommodated by regular transportation. This funding also provides for the transportation of a teacher, a child development specialist, or a teacher assistant to the home of a **child** enrolled in an **in-home program**.

CONDITIONS

Revised

1. Special Transportation

   a) **Private ECS Operators** and metro urban boards may receive special transportation funding for ECS **children with disabilities** who cannot be accommodated by regular transportation because of their disabilities and, therefore, require special transportation, such as a handi-bus.

   b) Special transportation funding is also provided for ECS **children with special needs** who, because of their young age, are not able to ride regular transportation. This includes children with a severe disability (ages 2.5 to 4.5), and children with a mild or moderate disability and children who are gifted and talented (ages 3.5 to 4.5).

   c) Program or **school** location shall not be considered when determining eligibility for this funding.

2. A **student with a disability** who is eligible to enter grade 1 and is at least 5 years 6 months on September 1 cannot be counted for ECS transportation. These **funded students** are to be counted and claimed for transportation by the **school jurisdiction** under the rural or urban transportation funding in Part 1.

3. **In-home Program** Transportation

   a) For the purpose of this section, in-home transportation means transportation for each scheduled visit made by a teacher, a child development specialist, or a teacher assistant to the home of a **child with a disability** enrolled in an **in-home program**.

Revised

   b) In-home transportation funding will not be paid for more than the following number of visits to any one home during a program period:

      i) 36 visits in the case of a program unit **child**, or
      ii) 22 visits in the case of a **child with a mild or moderate disability**.

4. Transportation costs incurred for field trips or in-program activities cannot be claimed under this funding. For **children with severe disabilities** these costs may be claimed under Program Unit Funding.

REQUIREMENTS

1. An **ECS operator** that claims ECS special transportation funding must transport, or make arrangements for the transportation of **children with special needs** attending the **ECS program**.

2. If the transportation of **children with special needs** is not done by the **ECS operator**, then a contract or signed agreement must be in place with the company or person(s) transporting the **children**.

3. **Private ECS operators** and metro urban boards must submit to School Finance, by November 30, Form 03AL2.6, the **Early Childhood Services** Transportation (Regular and Special) application form. Urban and Rural **School Jurisdictions** should claim Special Transportation funding for **children with special needs** according to Requirement #1, in Section 1.18 (Special Transportation Funding).

   The special transportation funding provided for **ECS children** is calculated by multiplying the number of **children with special needs** who require special transportation because of their disability or young age by the number of program operation days. The total transportation days are multiplied by the special transportation rate. **Private ECS operators** and metro urban boards must return the completed form to School Finance.

   Funding for in-home visits made by a teacher or other professional is calculated by multiplying the number of scheduled in-home visits by the special transportation rate.

4. **Private ECS operators** and metro urban boards are to maintain records of:

   - names of **children** transported;
   - number of days each individual **child** is transported;
   - number of in-home visits;
   - actual costs of transportation; and
   - special transportation provided.

For **ECS programs** beginning in September:

5. The **count date** for transportation funding is September 30. The completed form 03AL2.6 must be submitted to School Finance by November 30.

For **ECS programs** beginning after September 30:

6. The **count date** for transportation will be the last **operating day** in the month in which the program begins. Form 03AL2.6 must be submitted to School Finance within three weeks of that **count date**.

7. ECS **children with special needs** registered after the **count date** are not eligible for special transportation funding. Transportation costs for ECS **children with severe disabilities** eligible to receive PUF may be claimed as a Program Unit expense.

CONSIDERATIONS

1. A **private ECS operator** or a metro urban board providing special transportation to and from an **ECS program** may charge the **parent** of a **child** a fee for the transportation service. The amount of the fee shall not exceed the total cost of the provision of ECS transportation services less the ECS transportation funding received from Alberta Learning.

PURPOSE

This funding is provided to address the needs of **children** in **Early Childhood Services (ECS) programs** who are experiencing difficulties in developing reading readiness and early literacy skills. This will provide **private ECS operators** with additional human resources that may be flexibly deployed as long as the ultimate benefit of any assignment serves to enhance the early literacy skills of those **children** identified as at risk. This funding will also provide for early literacy resources and in-service for ECS teachers, other staff and volunteers deployed as part of the **private ECS operator's** early literacy program.

CONDITIONS

1. A **private ECS operator** may receive Early Literacy funding for programs provided for **children** enrolled in an **ECS program**.
2. In order to access funding, a **private ECS operator** must indicate on their Notice of Intent they are providing an Early Literacy program.
3. Funding will be based on the current year enrolment with a minimum of $1200 available to each **private ECS operator**.
4. **Private ECS operators** must use the funding provided for additional human resources, the assessment and diagnosis of **children**, the acquisition of early literacy resources, or to provide in-service for **parents**, and for ECS teachers, or other staff that may be deployed as part of the Early Literacy program.
5. If a **private ECS operator** receives minimum funding, there is no requirement to hire additional human resources for the Early Literacy program. Smaller **ECS operators** are encouraged to work with other **school authorities** to purchase or co-ordinate Early Literacy services for their **children**.

REQUIREMENTS

1. A **private ECS operator** that receives funding for Early Literacy must provide the program and, unless Condition 5 (above) applies, must ensure that there is flexibility in delivery of the program so that all **children** who need early literacy assistance have access to the program.
2. A **private ECS operator** that receives funding for Early Literacy must employ additional human resources unless Condition 5 applies. Such additional staffing shall be under employment conditions that the **ECS operator** deems most appropriate.
3. A **private ECS operator** shall ensure its records document that the funding allocated under this section has been expended for the purposes for which it was intended. A **private ECS operator** will be required to report revenues and expenditures in the audited financial statements.

SECTION 2.9
ECS ADMINISTRATION FUNDING

PURPOSE

This funding provides for effective and efficient administration of **private ECS operators**.

CONDITIONS

Revised 1. Funding for administration is based on 6% of the TOTAL **ECS** funding a **private ECS operator** receives from Alberta Learning for:

   a) basic instruction;
   b) special needs funding (including mild/moderate funding, program enhancement project funding, and finalized program unit funding);
   c) Transportation (special and regular);
   d) plant operation and maintenance, and
   e) early literacy.

REQUIREMENTS

1. An **ECS operator** is not required to apply for administration funding; Alberta Learning determines an **ECS operator's** eligible funding using information on student enrolments and funding that Alberta Learning provides for instruction, special needs funding, plant operations and maintenance and student transportation.

CONSIDERATIONS

1. **School jurisdictions** will continue to receive System Administration funding for **ECS children** under Section 1.9, item 7 System Administration for 2003-2004.

2. For **private ECS operators** offering a PUF program, although System Administration is calculated initially on the approved PUF budget, this funding will be adjusted based on the final PUF amount approved (lesser of budget, actual costs or ceiling total).

PURPOSE

This funding, provided to **private ECS operators**, is for the maintenance and operations of **school** buildings that are safe, comfortable and suitable learning environments for **children**.

CONDITIONS

1. Funding for plant operations and maintenance is based on:

Revised

   a) the number of **children** in **ECS**;
   b) the area in square metres is based on an allocation of forty (40) square metres for every twenty-five (25) **children** in the program or portion of 25 **children**.

REQUIREMENTS

1. A **private ECS Operator** is not required to apply for plant operations and maintenance funding; Alberta Learning determines an operator's eligible funding using funded enrolment information.

CONSIDERATIONS

1. Example of calculating Plant Operations and Maintenance funding for an **ECS** program of 15 **children**.

   (# **children** x rate per **child**) + (Area rate per 25 **children**)
   = (15 x $232) + ($465)
   = $3,945

2. Example of calculating Plant Operations and Maintenance funding for an ECS program of 40 **children**.

   (40 x $232) + [$465 x 2]
   = ($9,280) + ($930)
   = $10,210

   $465 is provided for every 25 **children** or portion of 25 **children**

3. **School jurisdictions** with **ECS** programs will receive their Plant Operation and Maintenance funding from Alberta Infrastructure. The formula for calculating the funding may be different from the one outlined in this section.

SECTION 2.11
TEACHER SALARY ENHANCEMENT FUNDING

PURPOSE

This funding is provided to assist **private ECS operators** with the increased cost of certificated salaries and benefits. The funding is supplemental to Basic Instruction funding.

CONDITIONS

1. The amount of Teacher Salary Enhancement (TSE) funding for the 2003-2004 school year will be equal to the amount the **private ECS Operator** received for the 2002-2003 school year.

2. This funding may only be utilized for certificated salaries and benefits costs. It may not be used for other types of costs.

REQUIREMENTS

1. **Private ECS operators** that received TSE funding in 2002-2003 are not required to apply for 2003-2004 funding. Alberta Learning will provide the funding based on the 2002-2003 funding amount.

2. **Private ECS operators** that did not receive TSE funding in 2002-2003 should apply to the Director of School Finance for 2003-2004 funding.

PURPOSE

This funding provides for instruction that meets the learner expectations of students (grades 1 to 12) in core programs, complementary programs, and programs for **students with special needs**.

CONDITIONS

1. **Funded private schools** must provide students with access to:

   - Up to 950 hours of instruction for grade 1
   - 950 hours of instruction for grades 2 to 9
   - 1000 hours of instruction for grades 10 to 12

2. Revised Basic instruction funds are provided for each **funded student** in grades 1 to 12. Basic instruction funding includes funds to support programs for students with mild and moderate disabilities and students who are gifted and talented. **Funded private schools** should pool special education funding and utilize it for the provision of programs to support **students with special needs**.

3. All individuals who are at least 6 years of age but less than 20 years old on September 1 may be eligible for this funding. See definition of **funded student** in the Glossary of Terms.

4. Revised All individuals aged 5 years and 6 months or greater, but less than 6 years old on September 1 are counted as **funded students** if they are eligible to enter grade 1. See definition of **child** and **funded student** in the Glossary of Terms for exceptions.

5. Under no circumstances can an individual be counted as both a **funded student** and as a **child** in the same **school** year.

6. An individual who is eligible to proceed to grade 1 and is less than 7 years old on September 1 who has been assessed as **developmentally immature** and whose program plan involves both ECS and grade 1 instruction may be counted either as a **child** or as a **funded student.**

7. For students in grades 1 to 10, funding provided is based on enrolments as of September 30.

8. Course Completions for Students in Grades 10 to 12

Revised Basic instruction funding for senior high school students is provided based on the principle that instructional services are provided and courses are completed. Instructional services must be timetabled for both students and teachers.

All course completions claimed for funding must meet the general conditions of funding as outlined in the introductory section of this manual. Among the conditions that all courses must meet are the following.

- Teachers who provide or supervise the instruction are certificated and knowledgeable.
- Students have access to a minimum of 25 hours of instruction per credit. Instructional time does not include teacher convention days, professional development days, parent-teacher interview days, teacher planning days, staff meetings, statutory and **school authority**-declared days, lunch breaks, breaks between classes, supervised study halls, time taken for the registration of students, or extracurricular activities.
- Teachers offer the course in accordance with the approved Programs of Study.

a) A regular course (non-CTS) is considered completed for funding purposes when:

   i) a student has earned a mark of 50% or better in the course; or
   Revised ii) a student has earned a final mark of at least 25% but less than 50% in the course, and has attended at least 50% of the classes in the course or has worked on and been assessed for at least 50% of the course content.

   For diploma examination courses condition 8(a) also applies to the **school**-awarded portion of the mark.

b) For courses delivered to students on-line or by distance learning where the **funded private school** does not maintain a record of the student's participation in Revised the course, the attendance funding criteria may not apply. Funding will be provided if the student has:

   i) earned a mark of 50% or better in the course, or
   ii) earned a final mark of 25% or greater in the course and has worked on and been assessed for at least 50% of the course content.

Revised c) For all regular courses (non-CTS), **funded private schools** must maintain course outlines, detailed assessment records of student work in the course, records of student withdrawal, student attendance, and final marks. Also see the requirements in this section for more details.

Revised d) A one credit CTS course is considered completed for funding purposes when a student has worked on and been assessed for at least 50% of the course content.

e) Funding will not be provided for an incomplete CTS course if the prerequisite(s) was not completed in the same term or a prior term.

f) For all CTS courses, **funded private schools** must maintain course outlines and detailed assessment records of student work in the course. Also see the requirements in this section for more details.

g) Students are not restricted in the number of credits they can take in a school year.

h) Course Completion Statuses:

Revised

- A "complete" (COM) status should be used when a student finishes a regular course or when a student successfully completes a CTS course. A course completion status of COM may be used for all courses.
- A "withdrawal" (WDR) status should be used when a student chooses not to complete a course and the **funded private school** agrees to remove the student from the course. When a completion status of WDR is used, the course will not appear on a student's transcript. A course completion status of WDR may be used for all courses.
- An "incomplete" (INC) status should be used when a student does not withdraw from a CTS course yet does not demonstrate mastery of all the learner expectations identified in the Program of Study. An incomplete status has no associated mark(s). A course completion status of INC may only be used for CTS courses.
- When a course is reported as eligible for funding, all funding conditions must be met and all supporting documentation maintained, regardless of the completion status reported.

9. Funding for Funded Students in Grade 10

Basic instruction funding for grade 10 students is based on the following:

a) Grade 10 students taking a full-time program will be funded at $3,058 per student. A full-time program is determined to be 31 or more credits earned during September to June of the grade 10 school year.

b) Grade 10 students taking a partial program will be funded at $1,529 per student. A partial program is determined to be less than 31 credits earned during September to June of the grade 10 school year.

c) Funding is provided to the **school authority** where the **funded student** was enrolled on September 30. If a **funded student** is enrolled in two or more **school authorities** on September 30, the priority **school authority** will receive the applicable funding (i.e., full-time program or partial program). See Section 7.1 for Priority School Authority Conflict resolution details.

d) If a grade 10 **funded student** transfers to another **school authority** after the September 30 **count date**, and if the student did not earn any credits with the first **school authority**, the second **school authority** will receive the applicable funding (i.e., full-time program or partial program).

e) All grade 10 course credits earned with the priority **school authority** from September to June, where instruction is provided, and including those earned during regular **school** hours, weekends or evenings, provided through **schools** off-**school** site instruction, and Alberta Distance Leaning (ADL) courses, will be counted towards a full-time or partial program for funding purposes.

f) For summer school course credits, which start and end during July and August, funding will be based on Credit Enrolment Units (CEUs). If a student completes grade 9 in June of a school year and takes a grade 10 course(s) in the following summer months, the courses will be paid for on a CEU basis and the credits will not count towards a full time or partial program for the September to June grade 10 school year. Instruction must be provided for a minimum of:

- 80 hours for a five credit course; or
- 48 hours for a three credit course.

the student taking the grade 10 summer course(s) must enter grade 10 in the September following the grade 9 year. If the student does not enroll in grade 10 in September, the CEU funding for the summer courses will be withdrawn.

g) Full-time program funding of $3,058 is provided for grade 10 **students with special needs** who are 15 years of age or older on September 1.

h) Grade 10 **funded students** enrolled in at least one of the following English as a Second Language (ESL) courses: ESL 1120, 1121, 1122, 1123, or 1125, will be funded at 17.5 credits per student per semester ($1,529) or 35 credits per student for a full year ($3,058). The credits earned in another semester during the grade 10 school year will be added to the 17.5 credits for the ESL semester. If the credits for the two semesters total 31 or more, full-time program funding of $3,058 will be provided.

i) When two French as a Second Language (FSL) courses are taken in grade 10 in the same term, only one course will be counted for credit to determine full-time or partial program eligibility.

j) Full-time program funding is provided for grade 10 **funded students** enrolled in approved Institutional programs (Code 550) on September 30.

k) Credits must be submitted to Alberta Learning for the **school** year in which they were earned (i.e., credits earned in one year cannot be claimed in another year).

l) Credits granted through **challenge assessments** for grade 10 students will not be counted towards a full-time or partial program for funding purposes.

m) Integrated Occupational Program (IOP) course credits will be counted towards a full time or partial program at 5/3 times each credit completed.

n) Credits earned for senior high courses provided during weekends and evenings will be counted towards a full-time or partial program for funding purposes, if instruction is provided for a minimum of:
   - 80 hours for a five credit course; or
   - 48 hours for a three credit course.

o) Credits earned for Registered Apprenticeship Program (RAP), Work Experience, Special Projects and other credit courses involving substantial off-campus instruction will be counted towards a full-time or partial program for funding purposes.

p) Credits earned for repeated grade 10 courses will be counted towards a full-time or partial program for funding purposes as long as instruction is provided in accordance with the same requirements as the first time the course was taken. Credits for repeated courses taken, where the student previously received a mark of 100 percent in the course, will not be counted for funding purposes.

q) Course credits earned for locally developed senior high school credit courses, where instruction is provided will be counted towards a full-time or partial program for funding purposes.

r) Course credits earned for credit-bearing religious education courses, where instruction is provided will be counted towards a full-time or partial program for funding purposes.

s) Course credits earned for Special Projects 10 - 20 - 30 courses will be counted towards a full-time or partial program for funding purposes.

t) Funding is provided on a full-time or partial program basis for students in grade 10 who take full year junior high courses; 5 credits will be counted for each course completed (form 03AL1.2a) towards a full-time or partial program for funding purposes.

u) Credits in ADL courses paid by a **funded private school,** for students whose marks are reported by the ADLC, will be counted towards a full-time or partial program for funding purposes.

v) Credits earned by a grade 10 student who enrolls in a **funded private school** after the September 30 **count date**, if the student was not enrolled in any **school authority** in Alberta on or before September 30, will be counted towards a full-time or partial program for funding purposes.

10. Funding for Funded Students in Grades 11 and 12

Basic instruction funding for students in grades 11 and 12 is based on the following:

a) Funding is provided on a Credit Enrolment Unit (CEU) basis for senior high school courses completed during regular daytime hours, weekends, evenings and the summer months, with a maximum of 60 CEUs funded per student per **school** year (September to August). For senior high school courses with a credit value of 3, funding is based on 2.5 CEUs. For courses with a credit value of 5, funding is based on 5 CEUs. For courses with a credit value of 1, funding is based on 1 CEU.

b) Funding is provided for credits in senior high school courses completed during weekends, evenings, and the summer months, if instruction is provided for a minimum of:
   - 80 hours for a five credit course; or
   - 48 hours for a three credit course.

c) Funding is provided for credits in Alberta Distance Learning (ADL) courses paid by a **funded private school** for students whose marks are reported by the ADLC.

d) Funding is provided for RAP, Work Experience, Special Projects and other credit courses involving substantial off-campus instruction;

e) Funding is provided for repeated courses as long as instruction is provided in accordance with the same requirements as the first time the course was taken. Funding is not provided for students repeating courses where they previously received a mark of 100 percent in the course.

f) Funding is provided for high school credit courses completed that may not otherwise be counted towards a high school diploma (e.g. ESL 1125);

g) Funding is provided for credits earned through locally developed senior high school credit courses, where instruction is provided;

h) Funding is provided for credit-bearing religious education courses, where instruction is provided;

i) Funding is provided for credits in Special Projects 10 - 20 - 30 courses;

j) Funding is provided for students in senior high school who take full year junior high courses; the equivalent of 5 credits will be funded for each course completed (form 03AL1.2a);

k) For **students with special needs** who are 15 years of age or older on September 1 and classified as senior high students, funding is provided based on 35 CEUs.

l) Integrated Occupational Program (IOP) course credits will be counted at 5/3 times the regular CEU rate for each credit completed;

m) Students registered on September 30 and enrolled in at least one of the following ESL courses: ESL 1120, 1121, 1122, 1123 or 1125, will be funded at the rate of 17.5 CEUs per student per semester or 35 CEUs for a full year. No additional funding is provided for other courses completed;

n) Funding is provided for credits granted through **challenge assessments** at 20 percent of the CEU value for the courses challenged;

o) When two French as a Second Language courses are taken in the same term; only credit for one course will be funded;

p) Funding based on 35 CEUs is provided for senior high school students enrolled in Institutional programs (Code 550) on September 30;

q) Funding is provided for courses that are completed but failed by students, on the basis of the number of credits for which the courses were taken;

11. Funding for Students In Integrated Occupational Programs (IOP)

a) To recognize the extra costs of providing an IOP program, the following funding is provided for those grade 10 **funded students** who are eligible IOP students:
  - $3,672 per funded IOP student in a full-time program. A full-time program is determined to be 31 or more credits completed during September to June of the grade 10 school year.
  - $1,836 per funded IOP student in a partial program. A partial program is determined to be less than 31 credits completed during September to June of the grade 10 school year.

b) To be eligible for IOP funding, at least 50 percent of a grade 10 IOP student's total credits earned must be comprised of approved IOP credits.
i.e., For a student who completes 20 credits (no 5/3 adjustment), at least 10 or more credits must be approved IOP course credits for that student to be defined as an IOP student for funding purposes.

c) For **funded students** in grade 10, IOP course credits will be counted towards a full time or partial program basis at 5/3 times each credit completed.

d) Students in grades 11 and 12 taking IOP courses will continue to be funded on a CEU basis.

12. Payment Not Provided for Funded Students in Grades 10 to 12

Basic instruction funding for students in grades 10 to 12 is **not** provided for:

a) waived or retroactive credits;

b) maturity credits;

c) courses completed by non-**resident students** and **First Nations students** as defined in the Glossary of Terms;

d) high school credits taken by junior high school students (except for summer courses); this includes CTS courses completed by students in junior high school and Heritage Language high school credit courses;

e) post-secondary courses, including those that have been approved as locally developed courses;

f) credits granted through evaluation of out-of-province courses; or

g) extra-curricular or co-curricular activities, such as competing on an athletic team.

13. New **private schools** must obtain accreditation through the Governance and Program Delivery Branch. Final approval is given by the **Minister**. Newly qualifying **private schools** will indicate:

    a) The **school** is operated on a non-profit basis and is incorporated under the *Societies Act* or registered under Part 9 of the *Companies Act* or an act of the Legislature; and

    b) The **parents** of **funded students** enrolled in the **school** are ordinarily residents of Alberta. (*School Act*, Section 273)

14. A **funded private school** must keep in force a blanket fidelity bond with respect to the **private school** for all employees and **board** members in an amount acceptable to the **Minister**. The amount that is acceptable to the **Minister** shall be $50,000 or the amount of the accumulated surplus plus 40 percent of Alberta Learning funding for the program year (the value of the first payment in the first month of operation), whichever is less.

    Agents may refer to this as a "commercial blanket bond". With blanket bonding, no criminal investigation need be made before bonding and the insurance company need not assign blame for the **school** to be reimbursed in the event of defalcation of funds.

15. a) To receive funding, a **private school** must have seven (7) or more students from two (2) or more families enrolled who continue to be enrolled in the **school**.

    b) A **private school** accredited through the Governance and Program Delivery Branch and approved by the **Minister** will be required to provide instruction to students for a minimum of one year before it is eligible for public funding unless otherwise approved by the **Minister**.

16. Payments to a newly qualifying **private school** will begin when all funding conditions have been met to the satisfaction of the **Minister**. Applications should be submitted to the Governance and Program Delivery Branch. Payments will discontinue if the **private school** fails to meet one or more funding conditions.

17. Where the enrolment in a **private school** drops by more than fifty (50) percent in a **school** year, the **Minister** may authorize a reduction in payments due the **school**.

REQUIREMENTS

1) New **funded private schools**

The form "Annual Operational Plan" will be sent to new **funded private schools** by the Governance and Program Delivery Branch. New **funded private schools** are required to provide:

a. a Certificate of Incorporation under the *Societies Act* or a non-profit company registered under Part 9 of the *Companies Act* or a special act of the Legislature;
b. documented proof that their **facility** meets all applicable municipal and provincial public health, safety and building standards requirements; and
c. a signed declaration that the program will operate in accordance with the *School Act*, Section 28.

2) Existing **funded private schools**

The form, "Annual Operational Plan", a comprehensive Notice of Intent to Operate, will be sent to **funded private schools** by the Zone Field Services Branches in April. **Funded private schools** may be required to provide documentation such as the current status of their Certificate of Incorporation and proof that their **facility** meets fire and health safety standards.

3) **Funded private schools** must complete and return the "Annual Operational Plan", to their respective Zone Field Services Branch by May 31. Information on this form initiates the first payment of the coming **school** year.

4) All **funded private schools** must advise their respective Zone Field Services Branch within one week of any changes which occur in **facility**, society, or programs during the **school** year.

5) Accredited **private schools** must send an updated list of teaching staff (based on teachers employed as of September 15) to their respective Zone Field Services Branch by September 19, including those who have been hired subsequent to May 31, 2001. Any changes to teaching staff after September 15, should be submitted to their respective Zone Field Services Branches within one week of any changes.

6) Basic instruction funding is based on:

a) Student registration information in grades 1 to 10 as of September 30 that is submitted to Information Services by October 3;

b) Course completion information for students in grades 10 to 12 as follows:
    i) Student Information System for specific enrolment;
    ii) Student Records System / Course Information Database System (CIDS) for course marks;
    iii) **Schools** are required to maintain and retain for a period of 7 years, records of student attendance, final marks, course outlines, detail assessment records for

student work in the course and records of course withdrawal for students in grades 10 to 12.

c) Student information on Form 03AL1.2b for students attending First Nations **schools**.

d) Student information on Form 03AL1.2a for senior high students taking junior high courses.

7) Basic instruction funding for a **funded private school** is calculated as follows:

a) For grades 1 to 9, by multiplying the number of **funded students** enrolled on the **count date** by the basic instruction rate;

b) For grade 10, by multiplying the number of **funded students** enrolled on September 30 by the applicable program rate; and

c) For grades 11 to 12, by multiplying the completed CEUs by the CEU rate, with a maximum of 60 CEUs per student per school year (Sept. to Aug.).

8) Adjustments to enrolment data:

a) If an adjustment is required to the enrolment data reported to the Information Services Branch on September 30, **school authorities** must ensure that changes are made to their modification file.
b) After receiving your first RACERS data, any modification required can be submitted electronically using the "Add, Change, Delete" form (Form 03AL1.2c) before the April 30 deadline.

CONSIDERATIONS

1. For grades 11 and 12, when a student transfers from one high school to another during a term in which a course is offered, the **school authority** that provided the majority of instructional minutes may request the funding from Alberta Learning.

2. Alberta Learning has an agreement with the Canadian Copyright Licensing Agency (Cancopy). Most **schools** in the province are covered in the license. Alberta Learning makes the payment for the license on behalf of all participating **funded private schools**. The cost of the license, plus GST, is recovered from **funded private schools** on a full-time equivalent student basis.

3. Edulink, a new multi-function data exchange software tool has been created to help simplify current data management and exchange processes.

   The Council of Alberta School Superintendents (CASS) and Association of School Business Officials of Alberta (ASBOA) have agreed their membership will provide the necessary funds to support Edulink for a three-year period –from September 2002 to August 2005. Alberta Learning will deduct 35¢ plus GST per **funded student** and **ECS child** on behalf of all participating **funded private schools**. This deduction will be made in September and based on the prior year frozen **funded student** and **ECS child** count. The deduction will be reflected on the October funding statement. It is up to the individual **funded private schools** to apply for any GST rebate from the Government of Canada.

   Alberta Learning will forward the maintenance fee of $195,000 to Edmonton Catholic Schools, the host **board**. This funding will provide for the annual maintenance budget but is not sufficient to pay for significant changes to the software.

PURPOSE

This funding provides support to **Designated Special Education Private Schools (DSEPS)** for instruction of students with identified mild, moderate or severe disabilities.

CONDITIONS

1. Funding is provided for students with mild, moderate and severe disabilities, who meet Alberta Learning eligibility criteria, who were enrolled on September 30. Regular students attending the **DSEPS** with a sibling(s) at the **DSEPS** who has special needs will be funded at the regular **private school** basic instruction funding rate.

2. Funding is only provided to **DSEPS** that have been approved by the **Minister**. To obtain approval for this status the **private school** must send a request in writing to the Director of Special Programs Branch, Alberta Learning, **by May 31** prior to the year being applied for. The Director will review the request to determine if the operator meets or exceeds Alberta Learning standards for special education programming and that students attending the **school** meet eligibility requirements for special education. This program will be reviewed annually.

   New

   No satellite campuses for existing DSEPS will be approved without written consent of the Director of Special Programs Branch. Requests for satellite campuses must be submitted by June.

3. A **school jurisdiction** that directs a student to a **DSEPS** will pay all program costs that are not covered by funding provided by Alberta Learning to the **DSEPS**.

4. The **DSEPS** must advise **parents** of the need to discuss their **child's** mild or moderate special needs eligibility and placement options with their **resident board** prior to enrollment in the **DSEPS**. The **resident board** should retain a record of the discussion. After consulting with the **resident board** about a special education program for their **child**, **parents** may make an informed decision on the most appropriate placement for the **child**. If **parents** then choose to send their **child** to the **DSEPS**, enhanced funding of $8,718 per student will be paid directly to the **DSEPS**, with no cost to the **resident board**. To confirm that **parents** did consult with their **resident board**, one of the following types of documentation must be kept on file at the **DSEPS**:
   - A signed registration form at the **DSEPS** which contains a statement declaring that the **parent** consulted with their **resident board**; or
   - A signed letter from the **parent** attesting that they consulted with the **resident board**; or
   - A letter from the **resident board** confirming that the **parent** consulted with them on their special needs **child's** placement options.

These students must be coded by the **DSEPS** using the funding codes 110 and 500 with the applicable special needs 50s code (mild/moderate).

5. If a **parent** enrolls their child in a DSEPS without consulting with the **resident board** on the child's eligibility for a special education program, the **DSEPS** will only be eligible for basic support funding of $5,343 (rather than full funding of $8,718) per student. Included in the Basic support funding rate is funding for basic instruction, transportation and plant operation and maintenance. These students will be coded by the **DSEPS** using the funding code 500 with the applicable special needs 50s code (mild/moderate). The 110 code cannot be used for these students.

6. The **DSEPS** shall report all students enrolled in their **school** to Information Services. **DSEPS** must also notify **school boards**, in writing, of their **resident students** who are registered at the **DSEPS**. This list should indicate:
   - Which students' **parents** consulted with the **resident board** on the special needs placement options for their **child** prior to enrollment at the **DSEPS**;
   - Which students are newly enrolled; and
   - Which students currently attending who were enrolled in previous years.

   A copy of this notification should also be sent to the Director of School Finance, at Alberta Learning, confirming which of the students' **parents** have discussed placement options with their **resident board** and which did not. This confirmation will determine the basis of Alberta Learning's payment to the **DSEPS** (i.e. enhanced funding or basic support funding).

7. Enhanced funding will be provided for students with mild/moderate disabilities whose **parents** placed them in the **DSEPS** prior to September 30, 1998 as long as they are attending the **DSEPS**.

8. For students enrolled with a **school jurisdiction** on September 30 who transfer to a **DSEPS** after September 30 in a school year (or vice versa), funding must be transferred on a pro-rated basis based on a 10-month program. The funding transferred would be paid for the months remaining in the school year. For example: If the student has transferred to a **DSEPS** on December 1, funding would be transferred as follows:
   - If the **parent** consulted with the **resident board** on the student's special education program, $6102.60 would be transferred (7/10 X $8,718).
   - If the **parent** did not consult with the **resident board** on the student's special education program, $3,740.10 would be transferred (7/10 X $5,343).

   If the student returns to the **resident board** in the same school year, the funding must then be returned by the **DSEPS** to the **resident board** on a pro-rated basis based on a 10-month program.

   No pro-rated funding will be provided by Alberta Learning to the **DSEPS** for students enrolled after September 30.

9. For students with severe disabilities attending a **DSEPS**, basic support funding of $5,343 and severe disabilities funding will be provided to the **DSEPS.**

SECTION 3.3
SEVERE DISABILITIES FUNDING

PURPOSE

This funding provides for programs that meet the special education needs of students with severe disabilities.

CONDITIONS

Revised

1. **Funded private schools** will use the severe disabilities categories/codes and related definitions/criteria in the Glossary of Terms to determine a student's disabling condition for severe disabilities funding eligibility purposes.

2. Severe disability funding for all students attending a **private school**, including **Designated Special Education Private Schools (DSEPS)** will be based on September 30 enrolments as reported by the **funded private school** to the Information Services Branch. Severe disability funding will be paid directly to the **DSEPS** for eligible **students with a severe disability**.

3. If a student has a medical condition/disability which has not changed significantly since the initial diagnosis and was previously approved by Alberta Learning, current documentation outlining assessments, treatment and current level of functioning may be sufficient to ensure continuation of severe disability funding.

4. Once a student is approved for severe disabilities funding, a review of eligibility will occur no more than every three years. The eligibility of new students may be reviewed in the first year they are claimed. Alberta Learning may audit claims approved for severe disabilities funding.

5. Severe disability funding for a **funded private school** is calculated by multiplying the number of eligible **students with severe disabilities** by the appropriate severe disabilities funding rate.

6. **Funded private schools** providing an approved institutional program may not claim severe disabilities funding for **students with severe disabilities** who are funded through **institution** Program Funding.

REQUIREMENTS

1. Eligibility for severe disabilities funding will be based on all of the following, which must be retained on file:

    a) assessment and diagnosis by qualified personnel (note: a diagnosis alone is not necessarily sufficient to qualify for funding);
    b) documentation/assessments of the student's current level of functioning in the learning environment;

c) a current **individualized program plan (IPP)** which addresses the student's diagnosed needs; and
d) identification of the levels of support and services being provided to the student.

Funded private schools must develop and implement an **individualized program plan (IPP)** supported by appropriate medical, psychiatric, psychological or other professional documentation for each **student with a severe disability** identified and attending the **private school**.

2. **Students with severe disabilities** claimed for this funding must receive three or more of the following levels of support:

Revised

a) a minimum of .5 FTE one-on-one instruction/intervention (e.g., teacher and/or teaching assistant time);
b) specialized or assistive technology to participate in education programs;
c) assistance for basic care (e.g., toileting, grooming, catheterization);
d) frequent documented monitoring of medical and/or behaviour status; and
e) direct therapeutic service at cost to the system (e.g., behaviour specialist, orientation and mobility specialist).

3. Severe disability funding is based on student registration information for grades 1 - 12, as of September 30, that has been submitted to Information Services by October 3. To facilitate the monitoring process, private schools are asked to send a copy of the list of students with severe disabilities submitted to Information Services on October 3 to the Special Programs Branch on the same date.

4. Students who are registered with a **school jurisdiction** on September 30 and are coded as having a severe disability, who then move after September 30 to a **funded private school** (including **DSEPS**), may be claimed for pro-rated severe disabilities funding by the **funded private school**. Pro-rated funding for applicable students may be claimed from Alberta Learning using the March 1 enrolment count date. Funding will be provided at fifty percent of the applicable rate for students with severe disabilities.

This would also apply to students who move from an institution (i.e., a hospital program, young offender centre, etc.) to a **funded private school**. Funding provided to the **school authority** where the student was originally registered will not be affected or pro-rated.

This pro-rated funding, based on the March 1 enrolment count, will also apply to newly identified/diagnosed **students with severe disabilities** who were not identified by the original **school authority** but were identified as a **student with a severe disability** after transferring to a **funded private school**.

Students with a severe disability who were not registered with any **school authority** as of September 30, and who are registered in a **funded private school** after September 30, may also be claimed for pro-rated severe disabilities funding

Funded private schools should identify these students to Information Services using the March 1 enrolment count date and provide a list of the students and documentation including monitoring forms, assessments, and **IPP** to the Special Programs Branch.

5. For **students with severe disabilities** who transfer from a **funded private school** to a **school jurisdiction** after September 30, severe disabilities funding shall be transferred by the **funded private school** to the jurisdiction on a pro-rated basis based on a 10-month program year.

6. For **students with severe disabilities** who transfer from a **funded private school** (including **DSEPS**) to a different **funded private school** after September 30, severe disability funding shall be transferred from the first **funded private school** to the second **funded private school** on a pro-rated basis, based on a 10-month program year.

REFERENCES

Standards for Special Education

Handbook for the Identification and Review of Students with Severe Disabilities

PURPOSE

Revised

This funding enables **funded private schools** to provide education programs that meet the education needs of **resident students of the government** approved in 1997/1998.

CONDITIONS

1. Students who were enrolled in **funded private schools** as **resident students of the government** in 1997/1998 will be "grandfathered" (for funding purposes) for as long as they remain a **resident student of the government** in a **funded private school**. The students who have been "grandfathered" are **resident students of the government** because they are **in the custody of a director** of Child Welfare, or have a guardian appointed under the *Child Welfare Act*. If their status as **resident student of the government** changes, they will no longer be eligible for funding in this category.

Revised

2. Since 1998/1999, **resident students of the government** are considered **funded students** of the **school jurisdiction** in which they enroll.

3. A student, who is 18 years of age on September 1 of the **school** year and who is no longer **in the custody of a director**, is not eligible as a **resident student of the government**.

4. If a **resident student of the government** is less than 18 years of age on September 1 of the school year and meets the custody requirements, the student will continue to be a **resident student of the government** for the remainder of the school year, even if the student turns 18 years of age and no longer has status under Child Welfare.

CONSIDERATIONS

1. To determine the number of full-time equivalent (FTE) students in a program, students should be counted for the full month if they begin before the 15th, or if they continue after the 15th of the month. Any period of time less than this will be pro-rated using the actual number of days the student attended the program for the month.

2. A **funded private school** providing an educational program for **resident students of the government** will be responsible for assuring that the program is of comparable quality to other programs provided by that **funded private school**.

REQUIREMENTS

1. For each student claimed, **funded private schools** must attach to their funding application a Resident Student Notification form from Family and Social Services.

2. Funding will be provided using Form 03AL3.4 "Resident Students of the Government Funding", which is sent to **funded private schools**. This form is used for both the budget and final costs. The initial payment for the school year will not be released until the final claims for the preceding school year are submitted.

   Funded private schools should submit their budget form (03AL3.4) by October 15. Upon completion of the program, the **funded private school** must submit a final cost form (03AL3.4) by August 31, providing the number of **resident students of the government** and the tuition fee or net program cost. **Funded private schools** must keep a record of **resident students of the government** and if students cease to be enrolled during the school year, costs will be pro-rated on the final claim.

3. **Funded private schools** will be compensated for reasonable costs of programs for **resident students of the government**. If the **funded private school** does not have a set schedule of fees by category of program, fees will be determined by calculating reasonable costs of programs, including transportation, minus any education funding provided for the students.

PURPOSE

This funding to **funded private schools** is provided to assist **parents** with the education of their **children** in the home.

CONDITIONS

1. Funding may be provided to the supervising **funded private school** for **home education students** the school has agreed to supervise and provide with learning resources. The education programs for these students must meet the student learning outcomes described in the Alberta Programs of Study or stated in the schedule attached to the *Home Education Regulation*.

2. Revised Additional funding may be provided to **funded private schools** for **home education students** in grades 7 to 12 enrolled in the Alberta Learning Program of Studies through the Alberta Distance Learning Centre (ADLC) or through Distance Education Consortia operated by public **school authorities** in courses to a maximum of 50 percent of the cost of the registration fees and compulsory learning materials for these courses. The total cost of Alberta Distance Learning (ADL) courses funded by Alberta Learning for a **home education student** in a school year will not exceed the home education funding rate. This funding may be claimed on form 03AL1.4a.

3. Additional funding may be provided to the supervising **funded private school** for **home education students** in grades 1 to 6 taking a full course load of ADL courses where the total compulsory course costs (net of any applicable refundable deposit) exceed the 50 percent funding provided by the supervising **funded private school** to the home education **parents**. This funding may be claimed on form 03AL1.4b.

4. Students enrolled in grades 1 to 9 and participating in a **blended program** and accessing 50 percent or more of their education program at **school** may be claimed as **funded students** by the supervising **funded private school**. However, Alberta Learning will prorate the funding based on the percentage of the student's program taken at **school,** and the percentage of the student's program taken at home.

5. Students enrolled in grades 10 to 12 and participating in a **blended program** and accessing 20 percent or more of their education program at **school** may be claimed as **funded students** by the supervising **funded private school**. However, Alberta Learning will prorate the funding based on the percentage of the student's program taken at **school**, and the percentage of the student's program taken at home.

6. In accordance with Section 8 of the *Home Education Regulation*, a supervising **funded private school** shall provide to a **parent** of a student enrolled in a **blended program** an amount of money using the home education rate which is in proportion to the percentage of the program or courses provided by the **parent**.

7. When a student moves from one supervising **funded private school** to another after September 30, and the receiving supervising **funded private school** agrees to purchase ADL courses and related resources from the Learning Resources Centre, Alberta Learning will pay for 50 percent of the course costs to a maximum of the home education funding rate for the combined ADL purchases of both supervising **funded private schools**. Revised

8. **Home education students** and their **parents** must live in Alberta on September 30 of the current school year.

REQUIREMENTS

1. **Parents** are responsible for informing their supervising **funded private school** of their decision to provide a home education program for their **children**. **Parents** must fullfull this requirement by submitting all parts of the *Home Education Regulation* Notification Form No. 2 to the supervising **funded private school**. Form No. 2 is available from the supervising **funded private school** or from Alberta Learning's Home Education Information Package at: http://www.learning.gov.ab.ca/educationsystem/homeedinfo.pdf

2. The supervising **funded private school** must conduct at least two evaluations per school year, including a review of the student's portfolio with the parent at least twice a year. Revised

3. A supervising **funded private school** must offer annually not less than 50 percent of basic funding for home education to the **parents** of **home education students** for the purchase of Programs of Study and instructional materials.

4. Home education funding is based on:

   a) Student registration information in grades 1 to 12 as of September 30 that is reported to the Information Services by October 3; and

   b) Report of ADLC courses for **home education students** on form 03AL1.4a.

   c) Report of additional ADL course costs for grades 1 to 6 on form 03AL1.4b

5. Home education funding for a supervising **funded private school** is calculated by:

   a) multiplying the number of **home education students** in grades 1 to 12 on the September 30 **count date** by the home education rate; and

   b) adding 50 percent of compulsory ADL course costs for students enrolled in grades 7 to 12, as paid for by the supervising **funded private school**, not exceeding the home education funding rate.

c) adding the compulsory course costs for home ed students in grades 1 to 6 which exceed the 50 percent funding provided by the supervising **funded private school** to home education **parents**.

Revised

6. Funding for a supervising **funded private school** for each student enrolled in a **blended program** on the September 30 **count date** is the sum of the calculations in (a) and (b) as follows:

a) Multiply the percentage of the student's school provided portion by the basic instruction funding rate for supervising **funded private schools**, plus

b) Multiply the percentage of the student's home education portion by the home education rate including 50 percent of the ADL course costs to the pro-rated portion of the maximum.

Example 1:

A student in a home education program 40 percent of the time, using ADL courses and in a regular **school** program 60 percent of the time would be funded as follows:

Home education rate	40%	X	$1143	= $457.20
Plus ADL course costs to a maximum of 40 percent of home education rate	40%	X	$1143	= $457.20
Plus the Regular school rate (for applicable grade)	60%	X	$2672	=$1603.20
Total				**$2517.60**

Example 2:

New

A senior high student in a home education program for 70% of the time and in a regular **school** program for 30% of the time would be funded as follows:

Home education rate	70%	X	$1143	= $ 800.10
Regular School Rate (for applicable grade)	30%	X	$2672	= $ 801.60
Total				= **$1601.70**

CONSIDERATIONS

1. **Funded private schools** shall have home education policies in place that indicate which Programs of Study and instructional materials will be considered for reimbursement and the amount of reimbursement for students in **blended programs**.

REFERENCES

Home Education Policy 1.1.2

Home Education Regulation AR 126/99

PURPOSE

A credit for learning resources at the Learning Resources Centre (LRC) to assist accredited private schools in purchasing learning resources from the LRC.

CONDITIONS

1. A learning resources credit will be provided to accredited private schools for purchasing learning resources from the LRC.

Revised

2. The learning resources credit for an accredited private school is determined by multiplying the number of students enrolled on September 30 in grades 1 to 12 (who are under the age of 20) by the per student credit rate. In order to receive the credit students must be registered by accredited private schools with the Information Services Branch.

REQUIREMENT

1. An accredited private school is not required to apply for the learning resources credit; Alberta Learning will determine the credit using enrolment information.

CONSIDERATIONS

Revised

1. The learning resources credit is used by accredited private schools to help pay for learning resources purchased from the LRC. The learning resources credit would cover 25 percent of an order, while the **school** pays for 75 percent.
   Note: Accredited private schools may use their Resources for the Classroom funding to cover their 75% portion (see section 3.7 for more details).

2. The LRC will charge the regular selling price after the credit amount is fully utilized.

Revised

3. Unless requested otherwise by the accredited private school, the learning resources credit will be applied automatically against purchase orders until the full credit amount is used. Accredited private schools that do not want a particular purchase order charged against the credit should clearly state, "DO NOT APPLY THE LEARNING RESOURCES CREDIT" on the purchase order.

4. For annual financial accounting and reporting purposes, accredited private schools must show the amount of credit utilized as "Provincial Revenue" and also as an expenditure on the Audited Financial Statements.

Revised

5. The 2003/2004 Learning Resource Credit is valid for April 1, 2003 to March 31, 2004.

6. If requested, LRC will assist accredited private schools in managing locally determined credit ceilings on an individual **school** basis.

7. Accredited private schools can call the LRC or visit the LRC web site at www.lrc.learning.gov.ab.ca to inquire about the status of their credit.

NEW SECTION

PURPOSE

A one-time allocation of funding to assist **funded private schools**, (not including band operated and Federal Government administered First Nations schools) in purchasing learning resources for the classroom from the Learning Resources Centre (LRC).

CONDITIONS

1. Resources for the Classroom funding will be provided to **funded private schools** for purchasing classroom learning resources from the LRC.

2. The amount of the Resources for the Classroom funding is determined by multiplying the number of **funded students** enrolled in grades 1 to 12 on September 30, 2002 by the Resources for the Classroom funding rate. In order to receive the funding, students must be registered by **funded private schools** with the Information Services Branch.

REQUIREMENT

1. A **funded private school** is not required to apply for the Resources for the Classroom funding; Alberta Learning determines the **funded private school** funding allocation automatically using the Sept. 30, 2002 **funded student** enrolment count.

CONSIDERATIONS

1. The Resources for the Classroom funding will be used by **funded private schools** to pay for learning resources from the LRC. This funding may be combined with the learning resources credit (Section 3.6) to cover 100% of the cost of the purchase.

2. After the **school** has fully utilized their Resources for the Classroom funding, they will be charged the regular selling price less any remaining learning resources credit.

3. Unless requested otherwise by the **funded private school**, the Resources for the Classroom funding will be applied automatically against purchase orders until the full allocated amount is used. **Funded private schools** that do not want a particular purchase order charged against the funding should clearly state, "DO NOT APPLY THE RESOURCES FOR THE CLASSROOM FUNDING" on the purchase order.

4. For annual financial accounting and reporting purposes, **funded private schools** must show the amount of funding utilized as “Provincial Revenue” and also as an expenditure on the Audited Financial Statements.

5. The 2003/2004 Resources for the Classroom funding is valid for April 1, 2003 to March 31, 2004.

6. If requested, LRC will assist **funded private schools** in managing locally determined funding ceilings on an individual **school** basis.

7. **Funded private schools** can call the LRC or visit the LRC website at www.lrc.learning.gov.ab.ca to inquire about the status of their funding.

SECTION 3.8
EARLY LITERACY FUNDING

PURPOSE

This funding is provided to address the needs of students in grades 1 and 2 who are experiencing difficulties in developing reading readiness and early literacy skills. This will provide **funded private schools** with additional human resources that may be flexibly deployed as long as the ultimate benefit of any assignment serves to enhance the early literacy skills of those students identified as at risk. This funding will also provide funding for early literacy resources and in-service for teachers, other staff, and volunteers deployed as part of the **funded private school's** Early Literacy program.

CONDITIONS

1. A **funded private school** may receive Early Literacy funding for programs provided for **funded students** in grades 1 and 2.

2. In order to access funding, a **funded private school** must indicate on the annual operational plan, submitted by May 31 of the previous **school** year, that it plans to provide Early Literacy programs for grades 1 and 2.

3. Funding will be based on the current **school** year enrolments in grades 1 and 2.

4. **Funded private schools** must use at least 85 percent of the funding to hire additional human resources to support classroom teachers in giving students at risk the special help and attention they need. The remaining funding, up to a maximum of 15 percent may be used to purchase early literacy resources, or to provide in-service for **parents** and for teachers, or other staff deployed as part of the **school's** Early Literacy program.

REQUIREMENTS

1. A **funded private school** that receives Early Literacy funding must provide the program and ensure that there is flexibility in delivery of the program so that all grades 1 and 2 students in a **funded private school** who need early literacy assistance have access to the program.

2. A **funded private school** that receives Early Literacy funding must employ additional human resources and may do so under employment conditions that the **funded private school** deems most appropriate.

3. **Funded private schools** must keep a record of this funding. The funding should be used to hire Early Literacy related classroom support and to purchase Early Literacy resources. If the **private school's** program objectives have been met and not all the funding was utilized, the remainder of the funding may be utilized for other programs.

4. **Funded private schools** will be required to report on the number of students served and their level of achievement. **Funded private schools** will be required to report revenues and expenditures in their audited financial statements.

SECTION 3.9
TEACHER SALARY ENHANCEMENT FUNDING

PURPOSE

This funding is provided to assist **funded private schools** with the increased cost of certificated salaries and benefits. The funding is supplemental to Basic Instruction funding.

CONDITIONS

Revised

1. The amount of Teacher Salary Enhancement (TSE) funding for the 2003-2004 school year will be equal to the amount the **funded private school** received for the 2002-2003 school year.

2. This funding may only be utilized for certificated salaries and benefits costs. It may not be used for other types of costs.

REQUIREMENTS

1. **Funded private schools** that received TSE funding in 2002-2003 are not required to apply for 2003-2004 funding. Alberta Learning will provide the funding based on the 2002-2003 funding amount.

Revised

2. **Funded private schools** that did not receive TSE funding in 2002-2003 should apply to the Director of School Finance for 2003-2004 funding.

SECTION 4.1
FEDERAL FRANCOPHONE EDUCATION FUNDING

PURPOSE

This funding for **French First Language (Francophone) Education** is provided by the Federal Government and is distributed to **francophone regional authorities** by Alberta Learning. This funding is supplemental to the funding provided by Alberta Learning to **francophone regional authorities**.

CONDITIONS

1. Under an agreement between the Governments of Canada and Alberta, and according to Section 10(1) of the *School Act*, **francophone regional authorities** may receive federal funds for providing a **French First Language (Francophone) Education** for **funded students** in grades 1 – 12 and **children** in ECS programs.

2. **Francophone regional authorities** may also include as **funded students** under this section:

    a) a **funded student** they have directed to attend College Mathieu in Gravelbourg, Saskatchewan; or

    b) a student who attends another **school jurisdiction** with which the **francophone regional authority** has entered into an **educational services agreement** as per Section 62 of the *School Act*. When registering these students, the providing **school authority** must register the students using code 145, and enter the authority code for the directing **francophone regional authority** in the "**Resident Board**" field. The **francophone regional authority** does not register the student.

    c) An individual who is a **First Nations student** is not eligible to be counted for funding under this section.

REQUIREMENTS

1. **Francophone regional authorities** must ensure all **funded students** receiving a **French First Language (Francophone) Education** are coded using code 221.

CONSIDERATIONS

1. This funding for **francophone regional authorities** is based on **funded student** enrolments as of September 30 (reported to Information Services by October 3) and the hours of French instruction for the school year (including both semesters for grades 10-12) for the reported students. The funding amount is calculated by multiplying the number of eligible FTE students by the per **funded student** rate provided in Consideration #4.

An FTE funded student means a **funded student** or ECS **child** who:

- receives 712 hours of instruction in French per year in ECS to grade 6 (75 percent of 950 hours of instruction per year); or
- receives 570 hours of instruction in French per year in grades 7 to 9 (60 percent of 950 hours of instruction per year); or
- receives 600 hours of instruction in French per year in grades 10 to 12 (60 percent of 1000 hours of instruction per year).

2. **Francophone regional authorities** must provide the following minimum average number of student instructional hours in French per year:

	ECS	238 hours per **child** / year
	Grades 1 to 6	475 hours per student / year
	Grades 7 to 9	380 hours per student / year
**	Grades 10 to 12	(10 credits) 250 hours per student / year

** The 250-hour minimum refers to students who take one 5-credit Français course and one other 5-credit course taught in French such as social studies or mathematics in one year.

3. **Funded students** and ECS **children** receiving a **French First Language (Francophone) Education** that have less than the minimum average hours of instruction in French specified in Consideration #2, will be funded as follows:

ECS to Grade 10

Funding Rate Per FTE Funded Student	X	Instructional Hours per Year 950 Hours	X	Number of **Funded Students/ ECS Children** in the program

Grades 11 to 12

Funding Rate Per FTE Funded Student	X	Instructional Hours per Year 1000 Hours	X	Number of **Funded Students** in the program

4. The following grant rates for 2003-2004 are provided as estimates for planning purposes only. Final grant rates will be confirmed once all enrolments for 2003-2004 are compiled.

PROGRAM	RATE
French First Language (Francophone) Education ECS- Gr.6	$105 per FTE
French First Language (Francophone) Education Gr. 7-12	$180 per FTE

SECTION 4.2
FEDERAL FRENCH LANGUAGE FUNDING

PURPOSE

This funding for French Language programs and/or courses is provided by the Federal Government and is distributed to **school authorities** by Alberta Learning to assist students in learning French. This funding is supplemental to the funding provided by Alberta Learning to all **school authorities**.

CONDITIONS

1. Under an agreement between the Governments of Canada and Alberta, **school authorities** may receive federal funds for providing instruction in French for **funded students** in grades 1 – 12 and **children** in **ECS programs**. The categories of instruction involving French which are funded are as follows:

   a) **Alternative French Language Programs** (French programs offered under Section 11(1) and 21(1) (a) of the *School Act*, including French Immersion); and
   b) **French as a Second Language (FSL)** courses (French programs offered under Section 39 of the *School Act*.

2. An individual who is a **First Nations student** is not eligible to be counted for funding under this section.

REQUIREMENTS

1. **School authorities** must ensure that students in an **Alternative French Language Program** (such as French Immersion), which provides the minimum instructional hours in French outlined in Consideration # 2, are coded using code 211.

2. **School authorities** must ensure that students taking FSL courses, or students in **Alternative French Language Programs** that do not meet the minimum instructional hours in French as outlined in Consideration # 2, are coded using code 230.

3. A **school authority** offering an **Alternative French Language Program** may, by resolution, authorize the commencement of an **Alternative French Language Program** in a **school** and upon passing the resolution shall inform the **Minister** in writing.

4. A **school authority** must develop, keep current and implement written policies and procedures consistent with provincial policies and procedures for:

   a) **Alternative French Language Programs** (such as French Immersion Programs); and
   b) **FSL courses**.

CONSIDERATIONS

1. Federal French Language funding is based on French program student enrolments as of September 30 (reported to Information Services by October 3) and the hours of instruction in French for the school year (including both semesters for grades 10-12) for the reported students. The funding amount is calculated by multiplying the number of eligible FTE students by the per FTE funded student rate provided in Consideration #5.

   For **alternative french language programs**, a FTE funded student means a **funded student** or ECS **child** who:

   - receives 712 hours of instruction in French per year in ECS to grade 6 (75 percent of 950 hours of instruction per year); or,
   - receives 570 hours of instruction in French per year in grades 7 to 9 (60 percent of 950 hours of instruction per year).
   - receives 600 hours of instruction in French per year in grades 10 to 12 (60 percent of 1000 hours of instruction per year).

2. **Alternative french language programs** such as French Immersion should provide the following minimum number of student instructional hours in French per year:

	ECS	238 hours per **child** / year
	Grades 1 to 6	475 hours per student / year
	Grades 7 to 9	380 hours per student / year
**	Grades 10 to 12	(10 credits) 250 hours per student / year

   ** The 250-hour minimum refers to students who take one 5-credit French language arts course and one other 5-credit course taught in French such as social studies or mathematics in one year.

   If a student in an **alternative french language program** receives less than the minimum hours of instruction in French specified above, the student will be funded according to the formula for FSL (see Consideration #4).

3. FSL courses should fall within the following range of student instructional hours in French per year:

	ECS to Grade 6	40 to 474 hours per student / year
	Grades 7 to 9	40 to 379 hours per student / year
*	Grades 10 to 12	125 to 250 hours per student / year

   * **Schools** will indicate 250 hours for students who take two 5-credit FSL courses in one year.

4. **Funded students** and ECS **children** enrolled in a FSL course, or in an **alternative french language program** with less than the minimum hours of instruction in French specified in Considerations #2 and #3, will be funded as follows:

   Grades ECS to 9

Funding Rate Per FTE Funded Student	X	Instructional Hours per Year 950 Hours	X	Number of **Funded Students/ ECS Children** in the program

   Grades 10 to 12

Funding Rate Per FTE Funded Student	X	Instructional Hours per Year 1000 Hours	X	Number of **Funded Students** in the program

5. The following grant rates for 2003-2004 are provided as estimates for planning purposes only. Final grant rates will be confirmed once all enrolments for 2003-2004 are compiled.

PROGRAM	RATE
Alternative French Language Program ECS – Gr. 6	$105 per FTE
Alternative French Language Program Gr. 7-12	$180 per FTE
FSL courses ECS – Gr. 6/other courses*	$65 per FTE
FSL courses Gr. 7-12/other courses*	$90 per FTE

New

*This funding rate also applies for students and children taking courses in **alternative french language program** who receive less than the minimum number of instructional hours in French per year as per Considerations #2 and #4.

REFERENCES

Policy, Regulations and Forms Manual
French as a Second Language and French Immersion Policy 1.5.2

CONDITIONS

1. A **francophone regional authority** with students who have insufficient fluency in French to achieve grade level expectations in Français and other subject areas, may receive funding for **Francisation** for each eligible **funded student** in grades 1 to 12.

Revised

2. Students eligible for **Francisation** funding:

   a) have homes in which the primary spoken language is not French;
   b) have minimal French or are non-French speaking; and
   c) are receiving **Francisation** services.

REQUIREMENTS

1. A **francophone regional authority** is responsible for determining the number of years a student has previously received **Francisation** services that were funded by Alberta Learning.

New

2. Student registration information for grades 1–12 as of September 30 of the current school year must be submitted to the Information Services Branch by October 3.

3. To access funding, **francophone regional authorities** should use code 306 (Francisation). Non-francophone authorities offering Francisation services should use grants code 306 in conjunction with code 145 when registering a francophone student.

4. Documentation is available that shows the **Francisation** program is developed and services are provided to **Francisation** students that:

   a) address their linguistic, cultural and academic needs;
   b) place priority on the rapid integration of students in the **school** and community environment; and
   c) are quantifiable, i.e., a special class, pull-out service, identifiable services provided in a regular classroom and adapted for the individual student.

CONSIDERATIONS

1. **Funded students** enrolled in home education, **blended programs**, **outreach programs** or **virtual programs** are not eligible for funding under this section.

PURPOSE

This inter-ministerial funding is provided to Student Health Partnerships to improve access to and enhance the provision of integrated health and related support services for school children with special health needs so that they can participate fully in their education programs to attain their potential and be successful at learning.

CONDITIONS

1. Students with special health needs include students with physical disabilities, development disabilities, neurological disorders, sensory impairments, medical conditions, and/or emotional/behavioural disabilities who are registered in school programs from Early Childhood Services (ECS) through Grade 12. Services eligible for funding include speech-language therapy, physical therapy, occupational therapy, audiology, respiratory therapy, clinical nursing, and emotional/behavioural supports.

Revised

2. Student Health Initiative (SHI) funding is accessed by Student Health Partnerships consisting of **school authorities**, Regional Health Authorities, and Child and Family Services Authorities, which collectively set priorities, develop collaborative strategies for delivering services and share accountability for results.

Revised

3. Alberta Learning administers SHI funding on behalf of the following provincial government partners - Alberta Learning, Alberta Health and Wellness, and Alberta Children's Services.

4. SHI funding must be pooled and shared by the Student Health Partnership to provide students with identified special health needs with access to student health services. Students throughout the region must have equitable access to services regardless of their school program.

Revised

5. The SHI funding allocation may only be accessed if, and when, the **school authority** joins a Student Health Partnership, and a Service Plan is submitted that is signed by the Chair of the Partnership on behalf of all the required partners. The Partnership must include the regional health authority, the child and family services authority and at least one school **board**.

6. Decisions on how the SHI funding is to be utilized must be made jointly by the partners in the Student Health Partnership.

7. Alberta Learning distributes SHI funding for Student Health Partnerships through the "banker" school **board**.

REQUIREMENTS

1. Every school year, Student Health Partnerships must submit a Service Plan for approval. The Service Plan for the 2003/2004 school year with all required documents must be submitted by June 15, 2003. Revised

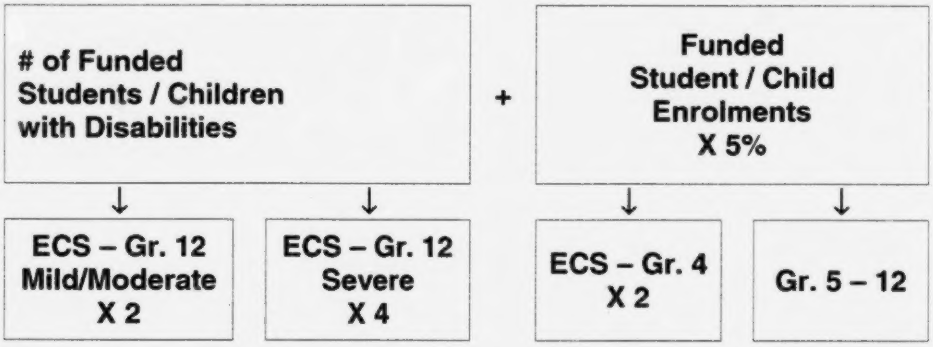
2. Student Health Partnerships must submit an Annual Report for the previous school year, with all required components and documents, by November 30 of the current school year.

3. Student Health Partnerships must designate a school **board** as a "banker" through which they will receive and distribute their funding. Student Health Partnerships are required to identify in their annual service plan who they have designated as their "banker" school **board** and of any changes to this designation.

CONSIDERATIONS

1. The allocation of the SHI funding to the Partnership is based on a funding formula that estimates the number of students within the participating **school authorities** who require student health services by combining the numbers of students with disabilities with a portion of the general student population who may require student health services. Revised

   Students with mild/moderate disabilities are weighted at 2X, and **students/children with severe disabilities** are weighted at 4X. These weightings are based on similar weightings used in Alberta Learning funding (i.e., students with mild/moderate disabilities are funded at approximately two times the level of regular students, and **students/children with severe disabilities** are funded at approximately four times the level of regular students). It is estimated that, in addition to **students/children with disabilities**, approximately 5 percent of the general student population may require student health services. The ECS – grade 4 enrolment population is weighted at 2X to give emphasis to early intervention.



# of Funded Students / Children with Disabilities
+
Funded Student / Child Enrolments X 5%
ECS – Gr. 12 Mild/Moderate X 2
ECS – Gr. 12 Severe X 4
ECS – Gr. 4 X 2
Gr. 5 – 12

Revised The total for the Partnership is then divided into the provincial total to express it as a percentage of the provincial total. The Partnership's percentage is then multiplied by the total budget allocation to determine the SHI funding allocation that will be provided to the Student Health Partnership of which the **school authorities** are a partner.

Commencing with the 2002/2003 Service Plan year, Student Health Partnerships are now provided with SHI funds according to their Partnership's profile. The profile includes **funded student** enrolment from the previous school year for all **funded students** registered in school programs with Alberta Learning (ECS through grade 12) in the geographic area of the Partnership.

The partners in the Student Health Partnership will decide how the pooled funding will be shared and utilized based on identified student health needs and priorities.

2. **Funded students** who are registered with **school authorities** in alternative programs such as home education/**blended**, **outreach** and **online** are counted in the SHI funding allocation through the **school authority** where they are registered. The SHI funds are provided to the SHI Partnership to which that authority belongs. Each Student Health Partnership is responsible for the student health needs of any student registered with its **school authority** partners who live in another region of Alberta.

   Requirements are outlined in the *Student Health Partnership Service Plan Guidelines for 2003/2004* and the *Student Health Partnership Annual Report Guidelines for 2003/2004*(available at <www.gov.ab.ca/studenthealth>).

PURPOSE

This funding repays the annual supported debt that **school jurisdictions** owe on **school** facilities.

CONDITIONS

1. A public or separate **school jurisdiction** may receive Debt Retirement funding if it has incurred, prior to April 1, 1995, debenture borrowings or capital loans for: new construction, modernization, upgrading of **school** buildings, furniture and equipment, and other related costs approved by the School Buildings Board.

2. The province will repay the debt owing on **school** building projects authorized by Alberta Learning effective September 1, 1995.

3. Alberta Learning will not provide debt retirement funding to a public or separate **school jurisdiction** for:

    a) Any current capital costs or debt owing on administration buildings, garages, warehouses, busses, and teacherages unless that space has been authorized by Alberta Learning for instructional use;

    b) Any unsupported debt incurred for **school** building projects because **school boards** did not use their capital building reserves for those projects as required by the Deputy Minister's letters of February 15, 1994 and February 24, 1995;

    c) Any costs of current **school** building projects that exceed the budget set by the School Buildings Board;

    d) Any unsupported costs of **school** building projects incurred by a school board after final project costs are established by Alberta Infrastructure, Learning and Housing Facilities Branch; and

    e) Any capital cost improperly incurred or contrary to the intent of the Deputy Minister's letter of February 15, 1994.

4. Interest-shielding applies where a **school jurisdiction** borrowed from Alberta Municipal Financing Corporation (AMFC) on the security of a debenture for a term of 10 or more years. The **school jurisdiction** may be paid the amount of the debenture interest that:

    a) applies to the unsupported portion of the debenture debt; and

CONDITIONS (CONTD.)

b) is in excess of debenture interest calculated at the following rates:

% Rate	Debenture Issue Date
8	January 1, 1974 to April 30, 1980
9	May 1, 1980 to March 26, 1981
11	March 27, 1981 where the borrowing was approved by the Local Authorities Board (LAB), on or before March 30, 1982.
11	Where borrowing was approved by the LAB on or after March 31, 1982 and before March 28, 1983 and the expired portion of the debenture term does not exceed 5 years.

Where the debenture borrowing is approved by the LAB on or after March 28, 1983 there will be no interest-shielding.

5. Interest-shielding through payment for debenture interest on the unsupported portion of the principal is limited to compensation for interest rates up to 12 percent inclusive.

CONSIDERATIONS

1. The annual debenture debt repayments for **school** buildings are paid directly by Alberta Finance on behalf of the **school jurisdictions** to AMFC.

2. The repayment schedule for capital loans will be on a monthly basis using information requested on form 03AL5.2. These payments will be made directly to **school jurisdictions**.

3. Interest-shielding on unsupported debentures will be paid directly to the **school jurisdiction**.

ALBERTA INITIATIVE FOR SCHOOL IMPROVEMENT FUNDING

PURPOSE

This funding is provided to **school authorities**, in addition to Basic Instruction funding, for specific local initiatives to improve student learning and performance.

CONDITIONS

Revised 1. Funding is provided for projects and project budgets that have been approved by Alberta Learning. Therefore the funding provided is the total of all the approved project budgets.

Revised 2. The amount in Condition # 1 is subject to a maximum funding level, which is calculated by multiplying the applicable rate per student/child by the September 30 student count of the previous school year for registered students in grades 1 – 12 and registered ECS **children**.

   Alberta Learning will approve multi-year projects. Funding for future years will be based upon demonstrated evidence of success. If funding is not continued for a project, the **school authority** may submit a new project proposal to Alberta Learning for the same or a lesser amount of funding.

3. Heritage Language Schools are not eligible for funding under this section.

REQUIREMENTS

1. **School authorities** develop school improvement project proposals based on identified student needs, which reflect unique local needs and circumstances. A project proposal must be submitted to the School Improvement Branch for approval using the project application form found on the Alberta Learning extranet.
2. **School authorities** have a high degree of autonomy and flexibility in designing school improvement projects and in allocating funding. The following conditions must be met for project approval:
   a) The project plan must provide for sufficient professional development and administrative support;
   b) Funding may not be used for payment of bonuses or other types of incentives; and
   c) Funding may not be allocated on a per-student basis to **schools**.

3. **School authorities** must provide Alberta Initiative for School Improvement (AISI) reporting information according to the following timelines:

   - **April 30** – for new projects in their first year, an interim progress report (IPR) indicating evidence of success must be submitted. These will be used to determine the continuity of funding for future years;
   - **October 15** – AISI Project Annual Report (APAR);
   - **November 30** – Annual Education Results Report includes a summary of the AISI projects.

4. Unexpended AISI funds at the end of the AISI project may be transferred to another AISI project, whether existing or new. **Revised**

CONSIDERATIONS

1. Funding for projects approved prior to September 1 will commence in September of the school year and will be based on the same payment schedule as basic instruction payments.

2. Funding for projects approved after September 1 will commence in the month following approval and may include "retroactive" funding, if that was part of the project approval.

3. **School authorities** may transfer funding among their project budgets as long as they remain within their total approved allocation. **Revised**

REFERENCES

Framework for the Alberta Initiative for School Improvement, 1999

Alberta Initiative for School Improvement Administration Handbook, December 20, 1999

Alberta Initiative for School Improvement Project Application Form and Database at www.learning.gov.ab.ca/sib/aisi

PURPOSE

This funding provides basic SuperNet high-speed network connectivity opportunities for **school authorities**.

CONDITIONS

1. **School authorities** will receive SuperNet Access funding for each approved site that is connected to and using SuperNet.

REQUIREMENTS

1. **School authorities** must sign a contract with a SuperNet vendor for all SuperNet connected sites.

2. **School authorities** must apply for SuperNet Access funding by submitting a SuperNet Access funding application (form 03AL5.4) to Alberta Learning's Stakeholder Technology Branch (STB) and a copy of the contract as soon as possible after the sites are connected to SuperNet network services.

3. **School authorities** must provide notification to STB of any proposed changes, including additions and/or deletions to the list of connected sites and the connection or disconnection dates for each site.

CONSIDERATIONS

1. SuperNet Access funding is provided on the basis of approved connected sites and the monthly service cost. The funding amount is determined by multiplying the number of eligible connected sites by the monthly SuperNet access rate.

2. Revised SuperNet Access funding for **school jurisdictions** is provided at 100 percent to a maximum of $503.50 per month for each approved site. **Funded private schools** will be funded to a maximum of 60 percent of this rate per month for each approved site. **Private ECS operators** will be funded to a maximum of 50% of this rate per month for each approved site. If the connection date is other than the 1st of the month, the payment for that month will be pro-rated according to the connection date.

3. ELIGIBLE SITES:
    a) Eligible sites include **school authority** central offices, schools, and network operation centres.
    b) Alberta Learning will consider special circumstances for inclusion as an eligible site on a case-by-case basis in consultation with the SuperNet consortium. The STB may be contacted for more information.

PURPOSE

This funding is provided for the management of six regional professional development consortia that coordinate resources at the local, regional and provincial level to support the development of knowledge, skills, and attributes necessary for all people who have an influence on student learning.

CONDITIONS

1. The consortium and its agent **board** will operate under the provisions of the "Guidelines for Establishing Regional Consortia".

2. Funding will be provided, to the six established regional professional development consortia approved by the **Minister**, for the management and "infrastructure" of the consortium.

3. Alberta Learning will provide infrastructure funding to a consortium's agent **board** at the specified rates.

4. Each consortium shall provide services on a cost-recovery basis.

REQUIREMENTS

1. If the annual infrastructure expenses are less than the funding provided by Alberta Learning, the consortium may transfer the surplus funds to the consortium program account. The consortium may utilize surplus funds for the delivery of professional development programs and services

2. The consortium must ensure that it has sufficient funds in its Accumulated Surplus to cover any current year deficit.

3. Each consortium shall assign an agent **board** to provide financial services, including financial reporting, on behalf of the consortium.

4. The agent **board** will provide the consortium with a Statement of Revenues and Expenses and a Statement of Financial Position (forms 03AL5.5a and 03AL5.5b). The consortium shall forward these statements, and an annual report that provides program details, to School Finance by November 30 of each year.

5. Each consortium's Board of Directors shall complete plans to assist **school** and **school jurisdictions** in the implementation of **school**-based decision making, and development opportunities for the education community.

CONSIDERATIONS

1. Alberta Learning will provide infrastructure funding to a consortium through its agent as follows:

   50 percent - September
   50 percent - February

   The release of the scheduled February payment will be dependent upon the receipt of the prior **school** year's Statement of Revenues and Expenses.

2. The **Minister** and the agent **boards** may add to, delete, vary or amend the terms of the Guidelines by reciprocal correspondence and mutual agreement.

REFERENCES

Guidelines for Establishing Regional Consortia: An Initiative for the improvement of Education and Its Delivery, Alberta Learning, October 1995.

PURPOSE

This funding provides for education programs for **resident students of the government** placed in **institutions** such as hospitals, young offender centres, treatment centers, youth assessment centers and group homes.

CONDITIONS

Revised

1. **School jurisdictions** and **funded private schools** authorized to provide an education program in an **institution** operated or approved by the Government of Alberta may qualify for institutional program funding. Funding is provided for educational programs for **resident students of the government** who reside in an **institution** or a **group home** approved by the Minister of Learning. Eligible **resident students of the government** are those who:

   a) are in the custody under the *Corrections Act*, the *Corrections and Conditional Release Act* (Canada), the *Young Offenders Act* (Canada)or the *Young Offenders Act*, or

   b) are **in the custody of a director** of Child Welfare, or have a guardian appointed under the *Child Welfare Act*, or

   c) are in long term medical care with a Regional Health Authority, or

   d) are a temporary resident of a women's shelter and require protection from physical, psychological or sexual abuse (for funding purposes under this section, these students are considered **resident students of the government**).

   These **resident students of the government** have been placed in the **institution** because they require care and protection, or they pose a danger to themselves or others, or they require extensive treatment and therapy.

2. **School jurisdictions** and **funded private schools** must have approval from the **Minister** and a contract/agreement with Alberta Learning in order to provide an educational program to students in the **institution**. Application for program approval should be submitted to the Director of the Special Programs Branch of Alberta Learning.

3. Institutional funding will only be provided for eligible **resident students of the government** who:

   a) reside in the **institution**; and
   b) must receive their education program in the **institution** because they are not able to attend a local community **school** or the local community **school** cannot provide an appropriate program.

Alberta Learning will not provide funding to cover the education program costs for non-eligible students attending institutional programs as outlined above (i.e., students who do not reside in the **institution** and/or who are not **resident students of the government**). These would include day students, students placed by the **school authority** providing the institutional program, tuition students from another **school jurisdiction**, or tuition students from out-of-province.

4. **Students with severe disabilities** who reside in an **institution** will be funded through Institutional Program funding and are not eligible for Severe Disabilities funding.

REQUIREMENTS

School jurisdictions and **funded private schools** with a contract or approval to provide an education program in an **institution** are required to:

1. Ensure all eligible institutional students are registered with the grant program code 550,

2. Submit a budget of reasonable and eligible costs using form 03AL6.1 to the School Finance Branch by April 30 for the following school year. See Requirement #10 for further instructions.

3. Submit a letter for approval to the Special Programs Branch explaining the need for additional funds when requesting a significant change to an approved budget.

4 Submit a statement of actual program costs and revenues using form 03AL6.1 to School Finance Branch by October 15 of the following school year. Funding will be based on the net actual cost of providing the program for costs approved on the budget. See Requirement #10 for further instructions.

   The Special Programs branch may request explanation for cost categories where actual costs significantly exceed the approved budget amount for that category.

5. Keep a daily attendance record for all students.

6. Submit an Annual Institutional School Profile Report form for the previous school year to the Special Programs Branch by October 15.

7. Ensure that the program provided in the **institution** is of comparable quality to other **school** programs provided by the **school jurisdiction** or **funded private school**. The **institution's** educational program shall be considered an integral part of the **school jurisdiction** or **funded private school** and subject to the same level of planning, evaluating and reporting required by provincial and local policy.

8. Submit a written proposal for approval of new institutional programs. The proposal should provide a description of the program and a budget that outlines the financial needs to support delivery of the program. The proposal should be sent to the Director

Revised

of the Special Programs Branch by May 1 of the school year preceding the school year for which approval is being requested.

Revised

9. Maintain the confidentiality of students in Women's Shelter programs by withholding the students' names and student ID numbers when submitting final costs for the programs. However, **school jurisdictions** and **funded private schools** should claim Basic Instruction funding for these students and report this revenue on budget and final cost forms.

10. **Instructions for Completion of 2003-2004 Institutional Funding Applications**

Important: There are two categories of institutional programs - Regular and Mixed programs. Regular institutional programs only have eligible **Resident Students of the Government** (i.e. students who were placed in the **institution** by a government agency and they reside in the **institution**). Programs of this type should complete the Regular Institutional Program form.

Mixed institutional programs have both eligible **resident students of the government** and non-eligible students. Non-eligible students are students who were not placed by a government agency and do not reside in the **institution** (i.e. day students, students placed by the **school jurisdiction**, tuition students from another **school jurisdiction** or tuition students from out-of -province.) Programs of this type should complete the Mixed Institutional Program form.

Instructional Salary Costs

a) Certificated Salaries & Benefits: teacher/**school** administration salaries and benefits.
b) Uncertificated Salaries & Benefits: teacher assistants and office staff.
c) Substitute Teacher(s): costs for substitute teachers when teachers or teacher assistants are not in **school**.

Supplies and Services Costs

a) Professional Development: staff training, conferences, and in-services.
b) Educational Supplies: materials & resources which students/teachers require for the educational program, such as textbooks, notebooks, videos, pens/pencils etc.
c) Educational Services: costs for educational or psychological assessments directly related to providing the educational program such as reading, math, I.Q., fine motor/gross motor skills.
   Note: Counseling, therapy or psychiatric services are not to be included in this category as these are the responsibility of the government agency operating the **institution**.
d) Office Supplies: materials for the administration of the **school** program such as paper, pens, binders, files.
   Note: Office capital equipment such as audio-visual equipment, copiers, staff computers, furniture, fixtures for the classroom or office are not to be included in this category as these costs are the responsibility of the government agency operating the **institution**.

Technology Costs

Computers and computer upgrades, peripherals (printers for instructional use, peripherals for special needs students), technical support, and software for teacher and student use that supports the learner outcomes identified by Alberta Learning.

Technology costs will be calculated using the lesser of the following amounts:

a) Actual costs, or
  (i) For regular institutional programs that have only institutional students, $500 X the daily average number of students (line D of the budget form), or
  (ii) For mixed programs (i.e. programs with institutional students and non-institutional students), $500 X the daily average number of institutional students (line E of the budget form), or
b) Maximum of $10,000 total per year. Requests over the maximum amount require prior approval from the Education Manager for **institutions** at the Special Programs Branch.

Revenues:

Please list the Basic Instruction revenues you received (or plan to receive) for the eligible **resident students of the government** who were enrolled on September 30 (note: these students should be coded as 550 in order to receive funding). List other funding you received for eligible **resident students of the government** in the program, but do not include the Institutional funding payments you received. Also, do not include System Administration funding, as this funding is provided to cover central office/system administration costs (which are not to be included on this budget). For Mixed Institutional programs, please ensure that the revenues reported are only for eligible institutional students. Revenues for non-eligible students should not be included.

Average Number of Students Enrolled:

To calculate the average number of students enrolled:

Step 1: Determine the number of students enrolled for each month that the program operated. Note: students who are enrolled for more than one month will be counted for each month attended (i.e. if a student attends the program for 3 months, then the student would be counted for each of the 3 months attended). For 2003-2004 Budgets, please use monthly enrolments from the 2002-2003 school year. For 2003-2004 Finals, please use monthly enrolments for the 2003-2004 school year.
Step 2: Add up the enrolments for each month to get an annual total.
Step 3: Divide the annual total by the number of months the program operated to determine the average number of students enrolled.

Average Number of Institutional Students Enrolled: (Mixed Programs only)

Use same formula as above for average number of students enrolled except only use the number of institutional students and do not include the non-institutional students who are enrolled.

UNDER REVIEW FOR CONSIDERATION OF AN EXPANDED MANDATE

PURPOSE

Revised

This funding is for designated **school jurisdictions** to provide **school authorities** with access to subsidized consulting services for students identified as sensory impaired multi-handicapped (SMH), severe to profound communication disordered, or severe to profound behaviour disordered (autism).

CONDITIONS

The process and criteria (funding and program) are currently being reviewed as part of an overall review of the regional educational consulting services program.

1. SMH students are eligible for regional educational consulting services if they have two of the following three categories of disabling conditions:

   Category 1 - Visual Impairment

   The student presents a visual impairment of such severity that he/she requires adaptation in the methods of presenting learning materials, the type of learning materials used or the learning environment.

   Category 2 - Hearing Impairment

   The student presents a hearing impairment of such severity that he/she is unable to hear spoken language either with or without amplification or hears imperfectly with amplification and the student requires specialized learning methods and materials for the development of speech and language; such hearing loss would be considered moderate or greater than moderate.

   Category 3 - any one or more of the following disabling conditions:

   a) A medical condition or physical disorder creating a requirement for personal assistance for day-to-day functioning, or creating a requirement for physiotherapy or occupational therapy as determined by a therapist qualified in the appropriate discipline;

   b) Inappropriate behaviour patterns which are sufficiently severe as to interfere with learning or social development; or

   c) Developmental, educational and social delay resulting from biological, genetic or environmental causes.

2. Severe to Profound Communication Disordered

A student qualifies for regional educational consulting services in this category in one of two ways:

(i) Non-Verbal Cognitive versus Communication Skills
Non-verbal cognitive skills are assessed as being at least half of the student's chronological age and one global area of communication (expressive/receptive) is depressed by half or more of the non-verbal age equivalency; or

(ii) Scattered Performance in Communication Skills
Non-verbal cognitive skills are assessed at a minimum of half the chronological age and one area of communication is reduced by half or more of the age equivalencies in other areas of communication.

3. Severe to Profound Behaviour Disordered (Autism)

Revised A student qualifies for regional educational consulting services in this category if they exhibit all the following characteristic behaviours:

(i) a disturbance of affect; and
(ii) a disturbance of developmental rates and sequences; and
(iii) an apparent disturbance of perception; and
(iv) a disturbance of speech and language.

The behaviour excesses and deficiencies exhibited by individuals with a severe to profound behaviour disorder may necessitate individualized, structured educational programming. Students with this disorder require close and constant adult supervision. Diagnosis must be by a chartered psychologist or psychiatrist.

4. Francophone Students with Special Needs

Revised The Réseau Provincial D'adaptation Scolaire will provide educational consulting services for **funded students** who have a mild, moderate or severe disability.

5. **Revised** Funding provided is based on the net actual total costs (as outlined in the audited financial statement) for the items approved in the budget submitted to Alberta Learning.

REQUIREMENTS

1. The **school jurisdictions** designated by Alberta Learning to provide regional educational consulting services will use Regional Teams to provide the following services to eligible students referred by **school authorities**:

   a) Consultation
   To provide education program recommendations, the specialists may confer with teachers, **parents** and other **school** personnel. Teachers and/or support staff may request assistance in developing specific education programs or advice on education issues concerning **students with special needs**.

   b) Inservice
   A wide range of inservice and staff development activities are available to teachers, paraprofessionals, administrators, professional colleagues and **parents**. Given the varied experience and expertise of the consultants, workshops may be tailored to the specific needs of the group.

   Revised

   c) Assessment
   This process includes individual diagnosis of a student's specific educational needs to assist school staff to develop and implement an effective program for the student.

Revised

2. A rate of $45 per hour will be charged by **school jurisdictions** designated to provide regional educational consulting services to **school authorities.**

3. **School jurisdictions** designated to provide regional educational consulting services will provide services to eligible students before offering services to non-eligible students. Regional educational consulting services may be offered to non-eligible students if they can be accommodated within the funding available. Revised

4. **School jurisdictions** designated to provide regional educational consulting services will be informed by letter from the School Finance Branch of their funding allocation from Alberta Learning for the next school year. Revised

5. The **school jurisdictions** designated to provide regional educational consulting services will submit a budget to the Special Programs Branch by May 30, indicating projected expenditures and revenues for the assessment consulting services for the upcoming school year. The budgeted expenditures shall not exceed the total revenues projected. Revised

6. The designated **school jurisdictions** will provide, to the School Finance Branch, an audited financial statement in respect of the revenues and expenditures associated with the provision of services on or before November 30 of each year for the previous school year ended.

7. The designated **school jurisdictions** will provide an annual report to the Special Programs Branch by November 30 for the previous school year.

CONSIDERATIONS

Revised

1. The **school jurisdictions** designated by Alberta Learning to provide regional educational consulting services are:

   a) Grande Prairie School District #2357 – C.A.S.E.
   b) Edmonton School District #7 – Belvedere Consulting Services
   c) Calgary School District #19 – R.E.A.C.H.
   d) Greater North Central Francophone Education Region #2 (for **francophone authorities** only) – Réseau Provincial D'adaptation Scolaire

2. For referral information in the following zones, the contact schools are:

ZONE 1	**C.A.S.E.** Crystal Park School 9351 – 116 Avenue Grande Prairie, Alberta T8V 6L5 Phone: (780) 539-0333 Fax: (780) 539-7613 E-mail: cpark@gppsd.ab.ca
ZONE 2, 3 and 4	**Belvedere Consulting Services** Edmonton Public Schools Belvedere School 13359 - 62 Street Edmonton, Alberta T5A 0V5 Phone: (780) 472-4450 Fax: (780) 478-7037 E-mail: belvedere@epsb.edmonton.ab.ca
ZONE 5 and 6	**REACH Services** Emily Follensbee Centre 5139 - 14 Street SW Calgary, Alberta T2T 3W5 Phone: (403) 777-6983 Fax: (403) 777-6997 E-mail: ddmorgan@cbe.ab.ca

Services for Francophone Authorities

Réseau Provincial D'adaptation Scolaire
120, 8627 – 91 Street
Edmonton, Alberta
T6C 3N1
Phone: (780) 487-3200
Fax: (780) 487-3434
E-mail: sgareaukubicki@csrcn.ab.ca

3. Contracts with designated **school jurisdictions** are negotiated individually by Alberta Learning to address the unique needs of their service areas including services to students in **francophone authorities**.

4. The Administrative Allowance, previously provided to cover jurisdiction costs associated with administering this service, has been replaced by System Administration Funding. Costs for this category should no longer be included on the financial statements.

PURPOSE

Enrolment counts are used to determine funding allocations for **school jurisdictions**, **funded private schools** and **private ECS operators** and are based on information obtained from Information Services.

CONDITIONS

1. All ECS children and all students in grades 1 to 12 who are enrolled and attending a **school** on September 30 of the **school** year will be counted at the **school** they are attending on that date. Students and ECS children enrolled after the **count date** will not be counted for funding purposes.

   Revised Note: For the purposes of this section, any references to students also refers to ECS children.

2. **Revised** A **school authority** may count a student who was not physically in attendance on the **count date** if the student was enrolled and in attendance prior to a **count date** and returned to class within 15 calendar days of that **count date**.

3. **Revised** A student who was not physically in attendance in any **school authority** on the **count date** but was in attendance in a **school authority** prior to the **count date**, and then changed to a different **school authority** during the **count date** period, may be claimed by the receiving **school authority** if the student was enrolled and in attendance within five calendar days of the **count date**.

4. Students who are receiving their education in a **home education program** provided by their **parents** will be counted by the supervising **school authority** where the student is enrolled on the **count date**.

5. **School jurisdictions** or **funded private schools** offering year round education to students in grades 1 to 9 will use **count dates** determined by School Finance on an individual basis to ensure fair and equitable funding for the students they are educating.

6. A priority **school** conflict occurs when more than one **school** claims the student on the September 30 **count date**. The priority **school** is the **school** a student is deemed to have been enrolled in on the September 30 **count date** when more than one **school** is claiming the same student for funding purposes.

7. Priority **school** conflicts must be resolved before a **school authority** is entitled to receive funding for a student. When priority **school** conflicts occur, **school authorities** should make every effort to resolve them as they have first-hand knowledge of the instruction the student is receiving and are in the best position to determine a fair and equitable solution.

8. If **school authorities** cannot resolve a priority **school** conflict, they should forward supporting documentation to School Finance for resolution as follows:

Revised

For Grades ECS to 9
Attendance sheets for the months of September and October are required, along with any documentation indicating (if applicable) the date of the student's last day of attending **school** and registration forms for new students.

For Grades 10 to 12
Instructional minutes for the first term (September through January) are required. These minutes should be based on the actual attendance of the student in all the courses that they were registered in the **school** during the first term. Note: Do not factor in second term class time.

Example: If a student missed a total of 30 classes in the first term, the instructional minutes should be based on total class time offered in the first term minus the 30 classes missed. Do not default to total class time offered.

In making its decision, School Finance will determine the priority **school** as follows:

a) The **school** where the student was enrolled, and in attendance, on the **count date**

b) If the student was enrolled, and in attendance, in two or more **school authorities** on the **count date**:

    i) The **school** delivering the majority of instructional minutes in the first term of the current **school** year would be deemed the priority **school**; or

    ii) In situations where instructional minutes are the same for two **school authorities**, funding will be distributed at 50 percent of the basic instruction rate applicable to each **school authority**. In this situation, students will not be counted in the system administration student calculations for either **school authority**.

9. **Priority School Authority Conflict (For Grade 10 Students only)**

A priority **school authority** conflict occurs when more than one **school authority** claims a grade 10 student on September 30. School Finance Branch will award the applicable grade 10 program funding to the **school authority** where the student was enrolled on the September 30 **count date**.

If the student was enrolled, and in attendance, in more than one **school authority** on the **count date,** the priority **school authority** conflict is resolved as follows:

i) The **school authority** delivering the majority of instructional minutes in the first term of the current **school** year would be deemed the priority **school authority**; or

ii) In situations where instructional minutes are the same for two **school authorities**, funding will be distributed at 50 percent of the applicable program rate to each **school authority**. These students will not be counted in the system administration calculations for either **school authority**.

Instructional minutes for the first term (September through January) should be based on the actual attendance of the student in all courses they were registered in the **school authority** during the first term. Second term class time is not included.

The following are examples of priority **school authority** conflicts:

a) Madison Smith is enrolled on September 30 with **school authority** A and completes 32 credits there. Madison also completes 15 credits at **school authority** B where Madison was not enrolled as of September 30. Who receives the funding?

ANSWER: Madison Smith was enrolled with **school authority** A on September 30, making them the priority **school authority**. They will receive the full program funding of $5,097 as Madison earned more than the 31 credits required with the priority **school authority**. **School authority** B does not receive any funding.

b) Allan Johnson is enrolled on September 30 with **school authority** A and earns 25 credits there. He also earns 15 credits at **school authority** B and 5 credits at **school authority** C (he was not enrolled at **school authorities** B or C as of September 30). Who receives the funding?

ANSWER: Allan Johnson was enrolled with **school authority** A on September 30, making them the priority **school authority**. They will receive the partial program rate of $2548.50 as Allan has earned less than 31 credits with the priority **school authority**. **School authorities** B and C receive no funding.

c) Connor Mah is enrolled on September 30 with **school authority** A and **school authority** B. Connor earns 28 credits at **school authority** A and 15 credits at **school authority** B. Who receives the funding?

ANSWER: Since Connor Mah was enrolled with both **school authorities** on September 30, a priority **school authority** conflict occurs and will be communicated to both **school authorities** via a RACERS turnaround report. The **school authority** that provides the most instructional minutes would be deemed the priority **school authority**. If **school authority** A provides the most minutes, they will receive the partial program rate of $2548.50 as Connor earned less than

31 credits with the priority **school authority**. In this case, **School authority** B receives no funding.

10. Course Conflicts (Grades 10 – 12)

A course conflict occurs when a regular senior high student has a **school** awarded mark reported by two **schools** in the same course, in the same semester and in the same **school** year. The **school** that delivered the most instructional minutes will be deemed the priority **school**. School Finance will identify these students in a turn-around report for **school authorities**.

To resolve these conflicts, the Course Conflict form must be completed and submitted to School Finance Branch via the RACERS program or through paper submission. On this form, the **school** must indicate the number of actual instructional minutes delivered to the student. These minutes should be based on total class time offered minus any class time absent. Do not default to total class time offered.

If the student is in grade 10, the **school** that provided the most actual instructional minutes will receive the credits associated with that course. If that **school** is in the student's priority **school authority,** the course credits will be added to the student's profile in determining the applicable grade 10 program funding for that **school authority**. If that **school** is not in the student's priority **school authority,** no funding is received.

If the student is in Grade 11 or 12, CEU funding will be awarded to the **school authority** that provided the most actual instructional minutes to the student.

REQUIREMENTS

1. Enrolment counts of students in ECS to grade 12 must be completed on September 30 and reported to the Information Services Branch by October 3.
2. The ages of all students and **children** must be determined as of September 1.

CONSIDERATIONS

1. When a **school jurisdiction's** total enrolment increases from the September 30 count to the March 1 count, funding for the enrolment growth is provided under Section 1.9, Funding in Transition, item 6, Growth and Density, of this manual.
2. The Student Information System User's Guide provides additional information for reporting student enrolments.

PART 1 – School Jurisdiction Funding

Sections 1.1 to 1.7, 1.9 (except Technology Integration and Growth and Density) to 1.13, 1.16 to 1.21, 5.3, 6.1, and 6.2.

School jurisdictions receive their funding allocation from the Alberta School Foundation Fund, the General Revenue Fund, and in the case of opted out separate **school jurisdictions**, the supplementary **school** tax requisition.

Alberta School Foundation Fund (ASFF)

ASFF payments will be made to **school jurisdictions** in monthly installments.

Opted-out **boards** will receive a monthly advance on their ASFF payment from Alberta Learning and on their local education property tax requisition entitlement. These **boards** are required to re-pay the advance on their local education property tax requisition by the last banking day in the months of March, June, September and December. Interest will be applied to over-due accounts at the same rate charged to municipalities. Opted-out **boards** will continue to collect education property tax requisition revenue from their municipalities each quarter.

General Revenue Fund (GRF)

Revised

The general revenue portion of funding will be distributed on a monthly basis at 8.33 percent per month, with the exception of January and August, which will be at 8.35 percent, and March, which may be adjusted up to 12 percent with the prior approval of the Assistant Deputy Minister, Corporate Services.

Payment Dates

Sept. 15, 2003	Dec. 15, 2003	Mar. 15, 2004	Jun. 15, 2004
Oct. 15, 2003	Jan. 15, 2004	Apr. 15, 2004	Jul. 15, 2004
Nov. 17, 2003	Feb. 17, 2004	May 17, 2004	Aug. 16, 2004

Advances will be calculated using the most recent information on **funded students**, other statistics, and the current year rates.

Adjustments will be made in January for grades 1 to 9 funding. For grade 10, payments will be adjusted in August, and if necessary, the following October for summer students. For grades 11 to 12, payments will be adjusted at the end of March and August, and if necessary, the following October for summer students.

In all cases, when funding is adjusted during the school year, the payment system will determine the amount owing to date, the advances previously paid, and the balance owing to adjust the allocation to the correct amount.

Section 1.9
Technology Integration
June - 100 percent
Growth and Density –in year growth for grades 1 to 10
May - August - 100 percent

PART 4 – Federal French Funding

Sections 4.1 and 4.2

On approval of allocations - 100 percent

Section 4.3 Francisation

Upon receipt and approval of the application form - 100 percent

PART 5 – Other Provincial Funding

Section 5.1 Student Health Initiative

On approval of joint plan - 58.33 percent advance
March/April - 100 percent less previous payment

Section 5.2 Debt Retirement

Supported debenture payments are made directly to the Alberta Municipal Financing Corporation on behalf of the **school jurisdiction.**

Funding for short term loans will be paid to a **school jurisdiction** on the 15th of each month based on 1/12 of the loans payable by the **school jurisdiction** in the school year.

Section 5.4 SuperNet Revised

September or upon approval of application - Prorated basis to Mar. 31
April or upon approval of application - Prorated basis to Aug. 31

Section 5.5 Regional Consortium

September -50 percent
*February -100 percent less previous payments
*Payment is contingent upon receipt of the previous year's Statement of Revenues and Expenses.

PART 2 – Early Childhood Services (ECS) Funding

The funding provided by Alberta Learning to **Private ECS operators** is released at set times provided all conditions have been met. The payment months are provided in this schedule to allow **private ECS operators** the opportunity to plan their cash flow to meet ongoing expenditures.

Sections 2.1, 2.3, 2.9, 2.10, 2.11 and 5.3.

The first payment for **private ECS operators** is processed after the "Notice of Intent to Operate" is received and is based on the enrolment estimate from that form.

All payments in January or later will be based on adjusted amounts using current year September 30 enrolment counts.

Revised

September - 40 percent advance*
January - 58.33 percent less previous payment**
April - 100 percent less previous payments

*Any ECS program with 13 or more mild/moderate children in the prior school year will receive an advance of Mild or Moderate funding based on last year's enrolment.
**All ECS programs with mild/moderate children will receive Mild or Moderate funding based on their current year September 30 enrolment count.

Note: With the approval of the Assistant Deputy Minister, Corporate Services, a March payment may be made up to 90 percent less previous payments.

Section 2.4 Program Enhancement Project (PEP)

Revised

September - 58.33 percent advance
April - 100 percent less previous payments

Note: With the approval of the Assistant Deputy Minister, Corporate Services, a March payment may be made up to 90 percent less previous payments.

Revised

Section 2.5 Program Unit Funding (PUF)

September - Designated Sp. Ed. ECS programs	- 40 percent advance based on the previous year approved PUF budget amount.
Upon approval of written request to School Finance - regular ECS programs	- up to 40 percent advance based on the previous year approved PUF budget amount or current year estimated budget.
Upon receipt of PUF application	- 58.33 percent less any previous payment
April	- 90 percent less previous payments
Upon approval of final costs	- 100 percent less previous payments

Note: With the approval of the Assistant Deputy Minister, Corporate Services, a March payment may be made up to 90 percent less previous payments.

Section 2.6 and 2.7 Transportation

Payment is based on receipt and review of a transportation application:

January	- 58.33 percent advance
April	- 100 percent less previous payment

Section 2.8 Early Literacy

April	- 100 percent

Payments will be made to **school jurisdictions** under Part 1, section 1.9.

PART 4 – Federal French Funding

Section 4.2 Federal French Language

On approval of allocations	- 100 percent

PART 5 – Other Provincial Funding

Revised

Section 5.4 SuperNet

September or upon approval of application	- Prorated basis to Mar. 31
April or upon approval of application	- Prorated basis to Aug 31

PART 3 – Private School Funding

The funding provided by Alberta Learning to **funded private schools** is released at set times provided all conditions and requirements have been met. The payment months are provided in this schedule to allow **funded private schools** the opportunity to plan their cash flow to meet ongoing expenditures.

Sections 3.1 (grades 1- 9), 3.2, 3.3, 3.5, 3.8, 3.9, and 5.3.

Advance payments will be made based on 2002/2003 enrolments and course information, and 2003/2004 rates.

All payments in January or later will be based on 2003/2004 enrolments.

Revised

September	- 40 percent advance based on last year's enrolment
January	- 58.33 percent less previous payment
April	- 100 percent less previous payments

Note: With the approval of the Assistant Deputy Minister, Corporate Services, a March payment may be made up to 90 percent less previous payments.

Section 3.1 Basic Instruction (Grades 10 to 12)

Revised

September	- 40 percent advance based on last year CEUs
March	- 58.33 percent less previous payment
August	- 100 percent less previous payments

Note: With the approval of the Assistant Deputy Minister, Corporate Services, a March payment may be made up to 90 percent less previous payments.

Section 3.4 Resident Students of the Government

September	- 58.33 percent advance based on approved budget claim form
March/April	- 90 percent less previous payments
On approval of Final Costs claim form	- 100 percent of actual costs less previous payments

PART 4 – Federal French Funding

Section 4.2 Federal French Language

On approval of allocations	- 100 percent

PART 5 – Other Provincial Funding

Section 5.1 Student Health Initiative (SHI)

On approval of joint plan	- 58.33 percent advance
March/April	- 100 percent less previous payments

Section 5.4 SuperNet

September or upon approval of application	- Prorated basis to Mar. 31
April or upon approval of application	- Prorated basis to Aug 31

PART 6 – Services Contracted by the Government

Revised

Section 6.1 Institutional Programs

September	- 58.33 percent advance based on approved budget claim form
April	- 90 percent less previous payments
On approval of Final Costs claim form	- 100 percent of actual costs less previous payments

SCHOOL JURISDICTIONS BASE OPERATING SUPPORT FUNDING:	2002-2003 school year	2003-2004 school year
Basic Instruction:		
Grades 1 - 9	**$4,367** per funded student	**$4,454** per funded student
Grades 10 (full time program - 31 or more credits)	**$4,997** per funded student	**$5,097** per funded student
Grades 10 (partial program - less than 31 credits)	**$2,498.50** per funded student	**$2,548.50** per funded student
Grades 10 (summer courses)	**$124.77** per CEU.	**$127.26** per CEU.
Grades 11 to 12 (funding maximum of 60 CEUs per student per school year	**$124.77** per CEU.	**$127.26** per CEU.
Amount of funding per funded student included in Basic Instruction to support programs for funded students with Mild or Moderate special needs and funded students who are Gifted and Talented.	**$368** per funded student **or** **$10.51** per CEU.	**$375** per funded student **or** **$10.72** per CEU.
Outreach Programs:		
Outreach Base Funding	**$50,000** per program	**$51,000** per program
Grades 1-9	**$4,367** per eligible funded student	**$4,454** per eligible funded student
Grade 10 (full time program - 31 or more credits)	**$4,997** per eligible funded student	**$5,097** per eligible funded student
Grade 10 (partial program - less than 31 credits)	**$2,498.50** per eligible funded student	**$2,548.50** per eligible funded student
Grades 11-12	**$124.77** per CEU.	**$127.26** per CEU.
Integrated Occupational Programs (IOP): (based on a 50% minimum IOP course load)		
Grade 10 (full-time IOP program)	**$6,000.00** per eligible funded student	**$6,120** per eligible funded student
Grade 10 (partial IOP program)	**$3,000.00** per eligible funded student	**$3,060** per eligible funded student
Grades 11 to 12	**$207.95** per CEU	**$212.11** per CEU

SCHOOL JURISDICTIONS BASE OPERATING SUPPORT FUNDING:	2002-2003 school year	2003-2004 school year
Severe Disabilities Funding:		
a) Severe Cognitive, Multiple, Physical/Medical disability, Deafness, or Blindness	$ 13,120 per funded student based on jurisdiction profile	$ 13,382 per funded student based on jurisdiction profile
b) Severe Emotional/Behavioral Disability	$ 11,479 per funded student based on jurisdiction profile	$ 11,709 per funded student based on jurisdiction profile
English as a Second Language	$722 per eligible funded student	$736 per eligible funded student
Enhanced Opportunities	Per approved project	Per approved project
First Nations, Metis and Inuit	Per approved program	Per approved program
Institutional Programs	Net cost of program for eligible students	Net cost of program for eligible students
Regional Educational Consulting Services	Net cost of program for eligible students	Net cost of program for eligible students
Sparsity/Distance		
- Sparsity rate	$549	$560
-Distance rate for distance from office to urban centre	43 cents per kilometer	44 cents per kilometer
- Per kilometre for distance from office to school over 25 km	30 cents per kilometer	31 cents per kilometer
The sparsity factor minimum is lowered from 0.25 to 0.07 for school boards serving more than 6000 students, of which more than 25 per cent but less than 50 per cent are rural students.		
Teacher Assistants Program	$41.65 per funded student based on Sept. 30 count for gr. 1 - 6.	$42.48 per funded student based on Sept. 30 count for gr. 1 - 6.
Early Literacy	$220 per funded student based on Sept. 30 count for gr. 1 and 2.	$224 per funded student based on Sept. 30 count for gr. 1 and 2.

SCHOOL JURISDICTIONS BASE OPERATING SUPPORT FUNDING:	2002-2003 school year		2003-2004 school year	
Learning Resources Credit - Provided on a Provincial Government fiscal year (April 1 to March 31)	**$10.25**	credit per registered student	**$10.46**	credit per registered student
Technology Integration	**$43**	per funded student	**$44**	per funded student
Home Education	**$1,121**	per eligible funded student	**$1,143**	per eligible funded student
Plus 50% of the cost of ADLC courses for grades 7 to 12 to a maximum of:	**$1,121**		**$1,143**	
Plus addional funding for Grades 1 to 6 ADLC courses				
Francisation	**$722**	per eligible funded student	**$736**	per eligible funded student
Regional Consortium	**$159,908**	per consortium	**$163,106**	per consortium
Growth and Density				
In-year growth	**$2,558**	per funded student	**$2,609**	per funded student
Year-to-year growth	**$530**	per funded student over the school growth rate of 8%	**$541**	per funded student over the school growth rate of 8%
Teacher Salary Enhancement	**6%**	of total certificated salaries and benefits as reported on 2000-2001 AFS		Same as 2002-2003 allocation
One-Time Grants for 2003-2004:				
Resources for the Classroom-$20 million			**$38.40**	per funded student
Transportation grants totalling $3 million				
Student Health Funding totalling $2 million				
Other Funding				
Alberta Initiative for School Improvement (AISI) **-maximum per registered student**	**$121**		**$120**	
SUPERNET Access Funding	**$503.50**	maximum per month per approved site	**$503.50**	maximum per month per approved site

SCHOOL JURISDICTIONS BASE OPERATING SUPPORT FUNDING:	2002-2003 school year		2003-2004 school year	
Plant Operations and Maintenance	**Alberta Infrastructure is now responsible for this funding**		**Alberta Infrastructure is responsible for this funding**	
System Administration	Percentage of: the Instruction funding, estimate of Plant Operations and Maintenance, and Student Transportation funding * 6 per cent if fewer than 2000 FTE students * 4 per cent if more than 6000 FTE students * between 6 per cent and 4 per cent on a sliding scale if between 2000 and 6000 FTE students			
Boarding	**$3,294**	per eligible funded student	**$3,393**	per eligible funded student
Rural Transportation	**formula based**		**formula based**	
Special	**$4,503**	per funded student with disabilities	**$4,638**	per funded student with disabilities
Weekend	**$3,665**	per funded student with disabilities	**$3,775**	per funded student with disabilities
Interschool Transportation rate	**$0.66**	per km for 2-way distance between schools	**$0.68**	per km for 2-way distance between schools

Density of Effective Transportation Service Area (2003 - 2004 only)

No. Eligible Students	0 - .74	.74 - 1.12	1.13 - 1.39	1.4 - 2.19	2.20 -2.79	2.8 +
0 - 1500	$515	$632	$701	$866	$899	$1,218
1501 - 3000	$515	$627	$701	$856		$1,149
3001 - 4500	$510	$616	$675			
4501 - 6000	$510	$611	$675			
6001 - 7500	$510	$600				
7501 +	$510					

Distance

2.4 - 5.9	6.0 - 9.9	10.0 - 13.9	14.0 - 17.9	18 - 25.9	26 - 37.9	38 +
8.42	$12.33	$14.74	$16.95	$20.40	$21.54	$22.65

SCHOOL JURISDICTIONS BASE OPERATING SUPPORT FUNDING:	2002-2003 school year		2003-2004 school year	
Urban Transportation	$423	per eligible passenger	$436	per eligible passenger
Special	$2,251	per funded student with disabilities	$2,319	per funded student with disabilities
Weekend	$3,665	per funded student with disabilities	$3,775	per funded student with disabilities
Metro Urban Transportation Block	$423	per expected eligible passenger	$436	per expected eligible passenger
Special	$2,251	per student with severe disabilties based on profile	$2,319	per student with severe disabilties based on profile

EARLY CHILDHOOD SERVICES (ECS) FUNDING RATES

ECS Operators funding	2002-2003 school year		2003-2004 school year	
ECS Basic Instruction Funding:	$2,184	per **child**	$2,227	per **child**
Portable Classrooms for ECS Operators				
Rental charge per month	$100	plus GST	$100	plus GST
Mild or Moderate disabilities and Gifted andTalented	$2,070	per eligible **child**	$2,111	per eligible **child**
Program Enhancement Project		per approved project		per approved project
Program Unit Funding (PUF) - for **children** with severe disabilities Maximum per **child**	$20,864	per 1st **child** in a unit	$21,281	per 1st **child** in a unit
- Maximum per child for each additional **child** in units with more than one **child**	$5,175	for each additional **child** in a unit	$5,279	for each additional **child** in a unit
Transportation - Special needs	$11.40	per round trip	$11.74	per round trip
Transportation - Regular	$423	per eligible transported **child**	$436	per eligible transported **child**
Early Literacy Minimum of $1,200 for each ECS operator	$39.60	per **child** based on September 30 count	$40.39	per **child** based on September 30 count
ECS Administration	Percentage (based on enrolments) of total ECS funding - 6 percent if fewer than 2000 FTE **children** - 4 percent if fewer than 6000 FTE **children** - Between 4 and 6 percent on a sliding scale if between 2000 to 6000 FTE **children**			

EARLY CHILDHOOD SERVICES (ECS) FUNDING RATES

ECS Operators funding	2002-2003 school year		2003-2004 school year	
Plant Operation and Maintenance (only for Private ECS operators and Private Schools)	$227	per **child**	$232	per **child**
Plus sq. m. rate based on 40 sq. m for 25 **children**	$456	for every 25 **children** or portion thereof.	$465	for every 25 **children** or portion thereof.
Alberta Initiative for School Improvement (AISI) - maximum per registered child	$61		$60	
Teacher Salary Enhancement Funding	6%	of total certificated salaries and benefits as reported on 2000-2001 AFS		Same as 2002-2003 allocation
SUPERNET Access Funding	$251.75	Maximum per month per approved site	$251.75	Maximum per month per approved site

Private Schools Funding	**2002-2003 school year**		**2003-2004 school year**	
Basic Instruction Funding				
Grades 1 - 9	$2,620	per funded student	$2,672	per funded student
Grades 10 (full time program - 31 or more credits)	$2,998	per funded student	$3,058	per funded student
Grades 10 (partial program - less than 31 credits)	$1,499	per funded student	$1,529	per funded student
Grades 10 (summer courses)	$74.86	per CEU	$76.34	per CEU
Grades 11 - 12 (funding maximum of 60 CEUs per student per school year)	$74.86	per CEU	$76.34	per CEU
Amount of funding per funded student included in Basic Instruction to support programs for funded students with Mild or Moderate disabilities and funded students who are Gifted and Talented.	$221 $6.31	per funded student **or** per CEU	$225 $6.43	per funded student **or** per CEU
Designated Special Ed. Private Schools (DSEPS)				
Funding rate for students with mild or moderate disabilities whose **parents consulted with their resident school board** prior to placement in the DSEPS (ie. coded as 110). Includes components equivalent to school jurisdiction funding.	$8,555	per eligible funded student	$8,718	per eligible funded student
*Funding rate for students with mild or moderate disabilities whose **parents did not consult with their resident school board** prior to placement in the DSEPS (ie. do not code as 110).	$5,243	*per eligible funded student	$5,343	*per eligible funded student
***This rate also represents the basic instruction rate for students with severe disabilities in DSEPS.**				
Integrated Occupational Programs (IOP): (based on a 50% minimum IOP course load)				
Grade 10 (full-time IOP program)	$3,600.00	per eligible funded student	$3,672	per eligible funded student
Grade 10 (partial IOP program)	$1,200.00	per eligible funded student	$1,836	per eligible funded student
Grades 11 to 12	$124.77	per CEU	$127.27	per CEU

Private Schools Funding	2002-2003 school year		2003-2004 school year	
Severe Disabilities Funding				
a) Severe Cognitive, Multiple, Physical/Medical disability, Deafness, or Blindness	**$13,120**	per eligible funded student	**$13,382**	per eligible funded student
b) Severe Emotional/Behavioral Disability	**$11,479**	per eligible funded student	**$11,709**	per eligible funded student
Resident Students of the Government		Net cost of the education program		Net cost of the education program
Institutional Programs		net cost of program forr eligible funded students		net cost of program forr eligible funded students
Home Education	**$1,121**	per eligible funded student	**$1,143**	per eligible funded student
Plus 50% of the cost of ADLC courses for grades 7 to 12 to a maximum of: Plus additional funding for Grades 1 to 6 ADLC courses. See section 3.5.	**$1,121**		**$1,143**	

PRIVATE SCHOOLS FUNDING RATES

Private Schools Funding	**2002-2003 school year**		**2003-2004 school year**	
Learning Resources Credit - Provided on a Provincial Government fiscal year (April 1 to March 31)	**$10.25**	credit per registered student	**$10.46**	credit per registered student
Early Literacy	**$132**	per funded student based on September 30 count for grades 1 and 2	**$135**	per funded student based on September 30 count for grades 1 and 2
Alberta Initiative for School Improvement (AISI) - maximum per registered student	**$73**		**$72**	
Teacher Salary Enhancement Funding	**3.6%**	of total certificated salaries and benefits on 2000-2001 AFS		same as 2002-2003 allocation
SUPERNET Access Funding	**$302.10**	maximum per month per approved site	**$302.10**	maximum per month per approved site
One-Time Grants for 2003-2004:				
Resources for the Classroom-$20 million			**$38.40**	per funded student

SUMMARY OF FUNDING APPLICATION FORMS

FORM NO.	FUNDING APPLICATION FORM	DUE DATE	RETURN TO
03ALDSA	Delegation of Signing Authority for funding applications	October 30	SF
03AL1.2a	Junior High Courses taken by Senior High Students (School Jurisdictions and Private Schools)	Upon Completion of Term/Course	SF
03AL1.2b	Report on Funded Students Attending First Nation Schools	April 30	SF
03AL1.2c	Add, Change, Delete form for Enrolments	*April 30	SF
03AL1.4a	Report of Jr. and Sr. High Home Education Students	December 15 June 30	SF
03AL1.4b	Report of Additional ADLC Course Costs for Grades 1 to 6	**	SF
Electronic Submission	Application Form Rural Transportation	December 1	SF
	Application Form Special Transportation and Boarding	December 1	SF
	Application Form Urban Transportation	December 1	SF
03AL2.5a	Program Unit Funding Application	January 2	SF
03AL2.5b	ECS PUF Statement of Actual Expenditure	October 15	SF
03AL2.6	ECS Transportation	December 1	SF
03AL3.4	Resident Students of the Government – Budget – Final	October 15 August 31	SF SF
03AL5.2	Capital Loans Form	October 24	SF
03AL5.4	SuperNet Funding Application	***Upon Connection	STB
03AL5.5a 03AL5.5b	Regional Consortium Statement of Revenue and Expenses Regional Consortium Statement of Financial Position	December 1	SF
03AL6.1	Institutional Program – Budget – Final	April 30 October 15	SP SF

***Or after receiving your First RACERS data.**
****After a full course load has been purchased for the home ed student.**
***** Or before August 31, 2004**

IMPORTANT DEADLINES - 2003/2004 SCHOOL YEAR

Modifications to Enrolment and Transportation Information to School Finance	**April 30, 2004**
Enrolment Turnaround Reports to School Finance	**May 31, 2004**
Course and marks submission or modification to IS	
First Semester	**June 30, 2004**
First and Second Quarter	**June 30, 2004**
Remaining Terms of the School Year	**November 15, 2004**
CEU Turnaround Reports to School Finance	
First Semester	**July 30, 2004**
First and Second Quarter	**July 30, 2004**
Remaining Terms of the School Year	**December 22, 2004**

LEGEND:
SF = School Finance
IS = Information Services
SP = Special Programs
STB= Stakeholder Technology Branch

DELEGATION OF SIGNING AUTHORITY FORM

This form is provided to allow the for the delegation of the Secretary-Treasurer's signing authority to other individuals who are authorized by the board to sign Alberta Learning funding applications on behalf of the Secretary-Treasurer.

School Authority Name: ______________________________

School Authority Code: ______________

NAME (S) (Please Print)	**SIGNATURES**

I certify that the above listed individual(s) are approved by the board to sign Alberta Learning funding application forms:

______________________________ ______________

Secretary - Treasurer Date

03ALDSA **Submit to the School Finance Branch by October 31.**

Alberta
LEARNING

SCHOOL JURISDICTIONS AND PRIVATE SCHOOLS

JUNIOR HIGH COURSES (TAKEN BY SENIOR HIGH STUDENTS)

For the School Year: September 1, 2003 to August 31, 2004

Name of School Jurisdiction or Private School: ______________________ **Authority Code:** __________

Name of School: ______________________________ **School Code:** __________

NOTE: Separate forms are required for each completion date and category combination.

COMPLETION DATE

☐ September 1 to March 1 ☐ March 2 to June 30 ☐ July 1 to August 31 (Summer School Only)

A-add D-delete	Alberta Learning Student I.D. #	Name of Student (Alphabetical) Surname / Given Name(s)	Course Name	Credit Value

CERTIFICATION

I certify that to the best of my information and knowledge that the number of students reported on this form is correct.

______________________ (Signature of: Secretary-Treasurer/Superintendent)

______________________ (Signature of: Teacher/Principal)

__________ (Date)

03AL1.2a **RETURN TO: SCHOOL FINANCE**

Alberta
LEARNING

REPORT ON FUNDED STUDENTS ATTENDING FIRST NATION SCHOOLS

For the School Year: September 1, 2003 to August 31, 2004

Name of School Authority: ______________________________

Authority Code: _______________

Alberta Learning Student I.D. No.	Name of Student	Birthdate			Grade	First Nation School
		YY	MM	DD		

CERTIFICATION

I certify that to the best of my information and knowledge that the information reported on this form is correct.

Signature of Secretary Treasurer/Superintendent

Date

03AL1. 2b **RETURN TO: SCHOOL FINANCE BY APRIL 30**

Alberta
LEARNING

BASIC INSTRUCTION
ADD, CHANGE, DELETE FORM
FOR ENROLMENTS

School Year: 2003/2004

Count Date: September 30, 2003

Authority Code: ____________

Authority Name: ____

School Code: ____________

School Name: ____

Action:		Registration:	
Student ID:		Local Board ID:	
Last Name:		First Name:	
AKA Last Name:		AKA First Name:	
Birth Date:		Gender:	
Address Line 1:			
Address Line 2:			
City:		Province:	
Postal Code:		Phone:	

Grade:			Enrolment Date:			
Citizenship:			Expiry Date:			
Sec. 23 Eligibility:			French Hours:			
Reg Entry Status:			Resident Juris:			
Exit Description:			Exit Date:			
Special Needs: 1		2				
Enrolment Type: 1		2			3	
Grant Codes: 1		2			3	

See Reverse for Legend

CERTIFICATION

I certify that to the best of my information and knowledge that the Information reported on this form is correct.

____
(Signature of: Secretary-Treasurer/Superintendent)

____
(Signature of: Teacher/Principal)

____
(Date)

03AL1.2c

RETURN TO: SCHOOL FINANCE BY APRIL 30

Legend

Action:	(A) Add, (M) Modify, (D) Delete
Student ID:	Alberta Learning assigned I.D. (9 digits)
Last/First Name:	Student Name
Local Board ID:	The number assigned by the school or school authority for internal tracking (if applicable)
Gender:	(M) Male, (F) Female
Birth Date:	Year, Month, Day (YYYY,MM,DD)
Enrolment Type:	Refer to Enrolment Type Table in Student Information System User's Guide
Grant Codes:	Refer to Grants Program Table in Student Information System User's Guide
Grade:	(EC) Early Childhood, (01) grade 1, (02) grade 2, etc. (UG) ungraded
Registration:	(D) Day, (E) Evening, (S) Summer
Resident Juris:	This field applies to Designated Special Education Private Schools only (Code 110). For students who's parents consulted with their resident school jurisdiction prior to enrolment in the Designated Special Education Private School.
Special Needs:	The following codes are for students and ECS children who have identified special needs. For funding purposes they should also be coded with the 500 code.

Severely Disabled
(Grades ECS – 12)

(41) Severe Mental Disability
(42) Severe Emotional/Behavioural Disability
(43) Severe Multiple Disability
(44) Severe Physical or Medical Disability
(45) Deafness
(46) Blindness
(47) Severe Communication Disability (ECS children only)

Other

(10) Developmentally Immature (ECS only, do not use 500 code)
(80) Gifted/Talented (ECS – Grade 12)

Mildly or Moderately Disabled

(30) ECS Mildly or Moderately Disabled

Grades 1 – 12:

(51) Mild Mental Disability
(52) Moderate Mental Disability
(53) Emotional/Behavioural Disability
(54) Learning Disability (All LD Students)
(55) Hearing Disability. Hard of hearing
(56) Visual Disability. Low vision
(57) Communication Disability
(58) Physical or Medical Disability
(59) Multiple Disability

French Hours:	The number of hours taught per year in French Language
Enrolment Date:	Year, Month, Day (YYYY,MM,DD)

Alberta
LEARNING

REPORT OF JUNIOR HIGH AND SENIOR HIGH HOME EDUCATION STUDENTS

WHOSE ADLC COURSES WERE FULLY FUNDED BY THE SCHOOL AUTHORITY FOR HOME EDUCATION STUDENTS ENROLLED ON SEPTEMBER 30, 2003

For the School Year: September 1, 2003 to August 31, 2004

Name of School Authority: ______________________ **Authority Code:** ______

Name of School: ______________________ **School Code:** ________

Alberta Learning ID #	ADLC File No.	Name of Student (Alphabetical) Surname / Given Name(s)	Grade	Course Code	Approved ADLC Course Costs
				TOTAL	$

PLEASE REFER TO ATTACHED COURSE LEGEND AND CLAIMABLE AMOUNT OF COURSE COSTS

CERTIFICATION

I certify that to the best of my information and knowledge that the information reported on this form is correct.

______________________ (Signature of Secretary-Treasurer/Superintendent)

______________________ (Signature of: Teacher/Principal)

__________ (Date)

RETURN TO: SCHOOL FINANCE

ALBERTA DISTANCE LEARNING CENTRE PRINT COURSE COSTS
APPROVED FOR REIMBURSEMENT BY ALBERTA LEARNING

REIMBURSEMENT WILL BE AT 50 PERCENT OF THE CLAIMABLE AMOUNT COLUMN

	Course Code	Subject	Registration Fee	Compulsory	Claimable Amount
Grade Seven	7100	Language Arts 7	$145.00	None	$145.00
	7110	Mathematics 7	$185.00	None	$185.00
	7130	Health & Personal Life Skills 7	$185.00	10.00	$195.00
	7140	Science 7	$185.00	$40.00	$225.00
	7150	Social Studies 7	$185.00	$25.00	$210.00
	7160	Physical Education	$160.00	None	$160.00
	7310	Art A	$120.00	None	$120.00
	7350	French A	$120.00	None	$120.00
	7360	German A	$120.00	None	$120.00
	7380	Ukrainian A	$120.00	None	$120.00
	7410	Music A	$160.00	None	$160.00
	7550	Environmental and Outdoor Education (Year 1)	$160.00	None	$160.00
Grade Eight	8100	Language Arts 8	$145.00	None	$145.00
	8110	Mathematics 8	$185.00	None	$185.00
	8130	Health & Personal Life Skills 8	$185.00	$15.00	$200.00
	8140	Science 8	$185.00	10.00	$195.00
	8150	Social Studies 8	$185.00	$15.00	$200.00
	8310	Art B	$120.00	None	$120.00
	8350	French B	$120.00	None	$120.00
	8360	German B	$120.00	None	$120.00
	8380	Ukrainian B	$120.00	None	$120.00
	8460	Ethics	$160.00	None	$160.00
Grade Nine	9100	Language Arts 9	$185.00	None	$185.00
	9110	Mathematics 9	$185.00	None	$185.00
	9130	Health & Personal Life Skills 9	$185.00	None	$185.00

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ALBERTA DISTANCE LEARNING CENTRE PRINT COURSE COSTS
APPROVED FOR REIMBURSEMENT BY ALBERTA LEARNING

REIMBURSEMENT WILL BE AT 50 PERCENT OF THE CLAIMABLE AMOUNT COLUMN

	Course Code	Subject	Registration Fee	Compulsory	Claimable Amount
	9140	Science 9	$185.00	$60.00	$245.00
	9150	Social Studies 9	$185.00	$10.00	$195.00
	9210	Mathematics Modified 9	$185.00	None	$185.00
	9310	Art C	$120.00	None	$120.00
	9350	French C	$120.00	None	$120.00
	9380	Ukrainian C	$120.00	None	$120.00
Grades	AGR 1010	Agriculture 1010	$51.00	None	$51.00
10, 11, and 12	AGR 1060	Agriculture 1060	$51.00	None	$51.00
	AGR 1110	Agriculture 1110	$51.00	None	$51.00
	CMH 1010	Community Health 1010	$51.00	None	$51.00
	CMH 1050	Community Health 1050	$51.00	None	$51.00
	CMH 1060	Community Health 1060	$51.00	None	$51.00
	CMH 2010	Community Health 2010	$51.00	None	$51.00
	CMH 2050	Community Health 2050	$120.00	$10.00	$130.00
	CMH 3010	Community Health 3010	$51.00	None	$51.00
	CMH 3020	Community Health 3020	$51.00	None	$51.00
	CMH 3030	Community Health 3030	$51.00	None	$51.00
	CMH 3040	Community Health 3040	$51.00	None	$51.00
	CMH 3050	Community Health 3050	$120.00	$10.00	$130.00
	CMH 3140	Community Health 3140	$51.00	None	$51.00
	COM 1020	Communication Tech. 1020	$51.00	None	$51.00
	COM 1070	Communication Tech. 1070	$51.00	None	$51.00
	CTR 1010	Career Transitions 1010	$51.00	None	$51.00
	CTR 1020	Career Transitions 1020	$51.00	None	$51.00
	CTR 1110	Fashion Studies CTR1110	$25.00	None	$25.00
	CTR 1120	Fashion Studies CTR1120	$25.00	None	$25.00

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ALBERTA DISTANCE LEARNING CENTRE PRINT COURSE COSTS
APPROVED FOR REIMBURSEMENT BY ALBERTA LEARNING

REIMBURSEMENT WILL BE AT 50 PERCENT OF THE CLAIMABLE AMOUNT COLUMN

	Course Code	Subject	Registration Fee	Compulsory	Claimable Amount
Grades 10, 11, and 12	CTR 1210	Career Transitions 1210	$120.00	None	$120.00
	CTR 2110	Fashion Studies CTR2110	$25.00	None	$25.00
	CTR 2120	Fashion Studies CTR2120	$25.00	None	$25.00
	CTR 2130	Fashion Studies CTR2130	$25.00	None	$25.00
	CTR 2140	Fashion Studies CTR2140	$25.00	None	$25.00
	CTR 2150	Fashion Studies CTR2150	$25.00	None	$25.00
	CTR 2210	Career Transitions 2210	$120.00	None	$120.00
	CTR 3110	Legal Studies 3110	$51.00	None	$51.00
	DES 1010	Design Studies 1010	$51.00	None	$51.00
	DES 1020	Design Studies 1020	$51.00	None	$51.00
	DES 1060	Design Studies 1060	$51.00	None	$51.00
	DES 2010	Design Studies 2010	$51.00	None	$51.00
	ELA 1104	English 10-2	$175.00	None	$175.00
	ELA 1105	English 10-1	$175.00	None	$175.00
	ELA 2104	English 20-2	$175.00	None	$175.00
	ELA 2105	English 20-1	$185.00	None	$185.00
	ELA 3100	English 30	$180.00	None	$180.00
	ELA 3115	English 33	$185.00	None	$185.00
	ELT 1010	Electro-Technologies 1010	$51.00	None	$51.00
	ENT 1010	Enterprise & Innovation 1010	$51.00	None	$51.00
	ENT 1020	Enterprise & Innovation 1020	$51.00	None	$51.00
	ENT 2010	Enterprise & Innovation 2010	$51.00	None	$51.00
	ENT 2020	Enterprise & Innovation 2020	$51.00	None	$51.00
	ENT 2030	Enterprise & Innovation 2030	$51.00	None	$51.00
	ENT 3010	Enterprise & Innovation 3010	$51.00	None	$51.00

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ALBERTA DISTANCE LEARNING CENTRE PRINT COURSE COSTS
APPROVED FOR REIMBURSEMENT BY ALBERTA LEARNING

REIMBURSEMENT WILL BE AT 50 PERCENT OF THE CLAIMABLE AMOUNT COLUMN

	Course Code	Subject	Registration Fee	Compulsory	Claimable Amount
Grades	FAS 1030	Fashion Studies 1030	$51.00	None	$51.00
10, 11, and 12	FAS 1040	Fashion Studies 1040	$51.00	None	$51.00
	FAS 1050	Fashion Studies 1050	$51.00	None	$51.00
	FAS 1060	Fashion Studies 1060	$51.00	None	$51.00
	FAS 1070	Fashion Studies 1070	$51.00	None	$51.00
	FAS 2070	Fashion Studies 2070	$51.00	None	$51.00
	FAS 2080	Fashion Studies 2080	$51.00	None	$51.00
	FAS 2090	Fashion Studies 2090	$51.00	None	$51.00
	FAS 2110	Fashion Studies 2110	$51.00	None	$51.00
	FIN 1010	Financial Management 1010	$51.00	None	$51.00
	FIN 1020	Financial Management 1020	$51.00	None	$51.00
	FIN 1030	Financial Management 1030	$51.00	None	$51.00
	FIN 2010	Financial Management 2010	$51.00	None	$51.00
	FIN 2020	Financial Management 2020	$51.00	None	$51.00
	FIN 2030	Financial Management 2030	$51.00	None	$51.00
	FIN 2040	Financial Management 2040	$66.00	None	$66.00
	FIN 3010	Financial Management 3010	$51.00	None	$51.00
	FIN 3020	Financial Management 3020	$51.00	None	$51.00
	FIN 3030	Financial Management 3030	$51.00	None	$51.00
	FIN 3040	Financial Management 3040	$51.00	None	$51.00
	FIN 3060	Financial Management 3060	$51.00	None	$51.00
	FNA 1400	Art 10 3 credits	$88.00	None	$88.00
		4 credits	$114.00	None	$114.00
		5 credits	$145.00	None	$145.00
	FNA 1405	Art 11	$185.00	None	$185.00
	FNA 2400	Art 20	$155.00	None	$155.00

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ALBERTA DISTANCE LEARNING CENTRE PRINT COURSE COSTS
APPROVED FOR REIMBURSEMENT BY ALBERTA LEARNING

REIMBURSEMENT WILL BE AT 50 PERCENT OF THE CLAIMABLE AMOUNT COLUMN

	Course Code	Subject	Registration Fee	Compulsory	Claimable Amount
Grades	FNA 2405	Art 21	$185.00	None	$185.00
10, 11, and 12	FNA 3405	Art 31	$185.00	None	$185.00
	FOR 1010	Forestry 1010	$51.00	None	$51.00
	FOR 1090	Forestry 1090	$51.00	None	$51.00
	FOR 2010	Forestry 2010	$51.00	None	$51.00
	FRA 1314	Francais 13	$185.00	$55.00	$240.00
	FRA 2314	Francais 23	$185.00	$50.00	$235.00
	FRA 3314	Francais 33	$185.00	$45.00	$230.00
	FSL 1305	French 13	$185.00	$35.00	$220.00
	FSL 1309	French 10	$185.00	$25.00	$210.00
	FSL 2309	French 20	$185.00	$50.00	$235.00
	FSL 3309	French 30	$185.00	$20.00	$205.00
	GER 1315	German 10	$145.00	$20.00	$165.00
	GER 2315	German 20	$145.00	$15.00	$160.00
	GER 3315	German 30	$145.00	$15.00	$160.00
	INF 1010	Information Processing 1010	$51.00	None	$51.00
	INF 1020	Information Processing 1020	$76.00	None	$76.00
	INF 1030	Information Processing 1030WIN	$51.00	None	$51.00
	INF 1050	Information Processing 1050WIN	$47.00	None	$47.00
	INF 1060	Information Processing 1060WIN	$47.00	None	$47.00
	INF 1080VB	Information Processing1080VB	$47.00	None	$47.00
	INF 2010	Information Processing 2010	$47.00	None	$47.00
	INF 2030	Information Processing 2030	$76.00	None	$76.00
	INF 2040	Information Processing 2040	$76.00	None	$76.00
	INF 2050	Information Processing 2050	$47.00	None	$47.00

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ALBERTA DISTANCE LEARNING CENTRE PRINT COURSE COSTS
APPROVED FOR REIMBURSEMENT BY ALBERTA LEARNING

REIMBURSEMENT WILL BE AT 50 PERCENT OF THE CLAIMABLE AMOUNT COLUMN

	Course Code	Subject	Registration Fee	Compulsory	Claimable Amount
Grades	INF 2060	Information Processing 2060	$47.00	None	$47.00
10, 11, and 12	INF 2070	Information Processing 2070	$47.00	None	$47.00
	INF 2080	Information Processing 2080	$51.00	None	$51.00
	INF 2090	Information Processing 2090	$71.00	None	$71.00
	INF 2100	Information Processing 2100	$71.00	None	$71.00
	INF 2110	Information Processing 2110	$71.00	None	$71.00
	INF 2120	Information Processing 2120	$71.00	None	$71.00
	INF 2150VB	Information Processing 2150VB	$51.00	None	$51.00
	INF 2160VB	Information Processing 2160VB	$51.00	None	$51.00
	INF 2170VB	Information Processing 2170VB	$51.00	None	$51.00
	INF 2180VB	Information Processing 2180VB	$51.00	None	$51.00
	INF 2190	Information Processing 2190	$51.00	None	$51.00
	INF 3030	Information Processing 3030	$76.00	None	$76.00
	INF 3040	Information Processing 3040	$76.00	None	$76.00
	INF 3050	Information Processing 3050	$76.00	None	$76.00
	INF 3060	Information Processing 3060	$51.00	None	$51.00
	INF 3070	Information Processing 3070	$51.00	None	$51.00
	INF 3090	Information Processing 3090	$71.00	None	$71.00
	INF 3120	Information Processing 3120	$71.00	None	$71.00
	INF 3150VB	Information Processing 3150VB	$51.00	None	$51.00
	INF 3160C	Information Processing 3160C	$51.00	None	$51.00
	INF 3170C	Information Processing 3170C	$51.00	None	$51.00
	INF 3180	Information Processing 3180	$51.00	None	$51.00
	LDC 1344	Spanish 15	$145.00	$20.00	$165.00
	LDC 2344	Spanish 25	$145.00	$20.00	$165.00
	LDC 2460	Religious Studies 25	$155.00	None	$155.00

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ALBERTA DISTANCE LEARNING CENTRE PRINT COURSE COSTS
APPROVED FOR REIMBURSEMENT BY ALBERTA LEARNING

REIMBURSEMENT WILL BE AT 50 PERCENT OF THE CLAIMABLE AMOUNT COLUMN

	Course Code	Subject	Registration Fee	Compulsory	Claimable Amount
Grades 10, 11, and 12	LDC 3344	Spanish 35	$145.00	$35.00	$180.00
	LGS 1010	Legal Studies 1010	$51.00	None	$51.00
	LGS 1020	Legal Studies 1020	$51.00	None	$51.00
	LGS 2010	Legal Studies 2010	$51.00	None	$51.00
	LGS 2020	Legal Studies 2020	$51.00	None	$51.00
	LGS 2030	Legal Studies 2030	$51.00	None	$51.00
	LGS 3010	Legal Studies 3010	$51.00	None	$51.00
	LGS 3040	Legal Studies 3040	$51.00	None	$51.00
	LGS 3050	Legal Studies 3050	$51.00	None	$51.00
	LGS 3080	Legal Studies 3080	$51.00	None	$51.00
	LOG 1010	Logistics 1010	$31.00	None	$31.00
	LOG 1030	Logistics 1030	$31.00	None	$31.00
	MAM 3010	Management and Marketing 3010	$51.00	None	$51.00
	MAM 3020	Management and Marketing 3020	$51.00	None	$51.00
	MAM 3030	Management and Marketing 3030	$51.00	None	$51.00
	MAM 3040	Management and Marketing 3040	$51.00	None	$51.00
	MAM 3050	Management and Marketing 3050	$51.00	None	$51.00
	MAT 1037	Mathematics 10 (Pure)	$185.00	None	$185.00
	MAT 1038	Mathematics 10 (Applied)	$190.00	None	$190.00
	MAT 1039	Mathematics 10 Bridging (Pure)	$113.00	None	$113.00
	MAT 1041	Mathematics Preparation. 10	$185.00	None	$185.00
	MAT 1225	Mathematics 14	$185.00	None	$185.00
	MAT 2037	Mathematics 20 (Pure)	$185.00	None	$185.00
	MAT 2038	Mathematics 20 (Applied)	$185.00	None	$185.00
	MAT 2225	Mathematics 24	$185.00	None	$185.00
	MAT 3037	Mathematics 30 (Pure)	$185.00	None	$185.00

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ALBERTA DISTANCE LEARNING CENTRE PRINT COURSE COSTS
APPROVED FOR REIMBURSEMENT BY ALBERTA LEARNING

REIMBURSEMENT WILL BE AT 50 PERCENT OF THE CLAIMABLE AMOUNT COLUMN

	Course Code	Subject	Registration Fee	Compulsory	Claimable Amount
Grades	MAT 3038	Mathematics 30 (Applied)	$185.00	None	$185.00
10, 11, and 12	MAT 3211	Mathematics 31	$185.00	None	$185.00
	OTH 1999	Special Projects 10 – 5 credits	$105.00	None	$105.00
	OTH 1999	Special Projects 10 – 3 credits	$63.00	None	$63.00
	OTH 2999	Special Projects 20 – 5 credits	$105.00	None	$105.00
	OTH 2999	Special Projects 20 – 3 credits	$63.00	None	$63.00
	OTH 3999	Special Projects 30 – 5 credits	$105.00	None	$105.00
	OTH 3999	Special Projects 30 – 3 credits	$63.00	None	$63.00
	PED 1445	Physical Education 10 – 3 credits	$103.00	None	$103.00
		– 5 credits	$145.00	None	$145.00
	PED 0770	CALM (Careers Life Management)	$143.00	None	$143.00
	SCN 1270	Science 10	$185.00	None	$185.00
	SCN 1285	Science 14	$185.00	None	$185.00
	SCN 2231	Biology 20	$185.00	$20.00	$205.00
	SCN 2242	Chemistry 20	$185.00	$20.00	$205.00
	SCN 2261	Physics 20	$185.00	$10.00	$195.00
	SCN 2270	Science 20	$185.00	$30.00	$215.00
	SCN 2285	Science 24	$185.00	None	$185.00
	SCN 3230	Biology 30	$185.00	$10.00	$195.00
	SCN 3240	Chemistry 30	$185.00	$10.00	$195.00
	SCN 3260	Physics 30	$185.00	$40.00	$225.00
	SCN 3270	Science 30	$185.00	$30.00	$215.00
	SSN 2171	Personal Psychology 20	$113.00	None	$113.00
	SSN 2172	General Psychology 20	$113.00	None	$113.00
	SSN 2176	General Sociology 20	$113.00	None	$113.00
	SSN 3166	World Geography 30	$113.00	None	$113.00

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ALBERTA DISTANCE LEARNING CENTRE PRINT COURSE COSTS
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REIMBURSEMENT WILL BE AT 50 PERCENT OF THE CLAIMABLE AMOUNT COLUMN

	Course Code	Subject	Registration Fee	Compulsory	Claimable Amount
Grades	SST 1150	Social Studies 10	$185.00	None	$185.00
10, 11, and 12	SST 1151	Social Studies 13	$185.00	None	$185.00
	SST 2150	Social Studies 20	$185.00	None	$185.00
	SST 2151	Social Studies 23	$185.00	None	$185.00
	SST 3150	Social Studies 30	$185.00	None	$185.00
	SST 3151	Social Studies 33	$185.00	None	$185.00
	TOU 1010	Tourism Studies 1010	$51.00	None	$51.00
	TOU 1040	Tourism Studies 1040	$51.00	None	$51.00
	TOU 1050	Tourism Studies 1050	$51.00	None	$51.00
	TOU 1060	Tourism Studies 1060	$51.00	None	$51.00
	TOU 1070	Tourism Studies 1070	$51.00	None	$51.00
	TOU 2050	Tourism Studies 2050	$51.00	None	$51.00
	TOU 3030	Tourism Studies 3030	$51.00	None	$51.00
	TOU 3040	Tourism Studies 3040	$51.00	None	$51.00
	TOU 3060	Tourism Studies 3060	$51.00	None	$51.00
	TOU 3070	Tourism Studies 3070	$51.00	None	$51.00
	TOU 3080	Tourism Studies 3080	$51.00	None	$51.00
	UKR 1355	Ukrainian 10	$145.00	$25.00	$170.00
	UKR 2355	Ukrainian 20	$145.00	$15.00	$160.00
	UKR 3355	Ukrainian 30	$145.00	$10.00	$155.00

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Alberta
LEARNING

REPORT OF ADDITIONAL ADL COURSE COSTS FOR STUDENTS IN GRADES 1 TO 6

For home education students in grades 1 to 6 taking a full course load of ADL courses where the total compulsory course costs exceeded the 50% funding provided by the supervising board.

For the School Year: September 1, 2003 to August 31, 2004

Name of School Authority:______________________________ **Authority Code:** ____________

Name of School:______________________________ **School Code:** ____________

Name of Student (Alphabetical) for which a full course load has been purchased Surname / Given Name(s)	Alberta Learning ID #	Grade	Costs in Excess of 50% Funding provided by Supervising Board *
TOTAL			$

*** PLEASE REFER TO THE CHART (on back) FOR FULL COURSE LOAD INFORMATION AND FOR COSTS ELIGIBLE FOR ADDITIONAL FUNDING.**

CERTIFICATION

I certify that to the best of my information and knowledge that the information reported on this form is correct.

______________________________ (Signature of Secretary-Treasurer/Superintendent)

______________________________ (Signature of: Teacher/Principal)

____________ (Date)

03AL1.4b

RETURN TO: SCHOOL FINANCE

Alberta Distance Learning Centre (ADLC) Course Costs - Elementary 2003/2004

	Grade 1	***Grade 2***	***Grade 3***	***Grade 4***	***Grade 5***	***Grade 6***
Course	Thematics 1	Thematics 2	Language Arts 3	Language Arts 4	Language Arts 5	Language Arts 6
Registration	$ 450.00	$ 275.00	$ 145.00	$ 210.00	$ 210.00	$ 190.00
Textbooks	$ 25.00	$ 25.00	$ 10.00	$ 35.00	$ 45.00	$ 45.00
Course	Mathematics 1	Mathematics 2	Mathematics 3	Mathematics 4	Mathematics 5	Mathematics 6
Registration	$ 205.00	$ 205.00	$ 245.00	$ 235.00	$ 195.00	$ 190.00
Textbooks	$ -	$ -	$ -	$ 10.00	$ 55.00	$ 20.00
Course			Social Studies/ Science 3	Social Studies 4	Social Studies 5	Social Studies 6
Registration			$ 145.00	$ 145.00	$ 145.00	$ 145.00
Textbooks			$ -	$ 65.00	$ 75.00	$ 55.00
Course				Science 4	Science 5	Science 6
Registration				$ 145.00	$ 210.00	$ 190.00
Textbooks				$ -	$ -	$ -
Total Cost	**$ 680.00**	**$ 505.00**	**$ 545.00**	**$ 845.00**	**$ 935.00**	**$ 835.00**
less: 50% funding provided by supervising board	$ 571.50	$ 571.50	$ 571.50	$ 571.50	$ 571.50	$ 571.50
Excess costs eligible for additional funding	**$ 108.50**	**$ 0.00**	**$ 0.00**	**$ 273.50**	**$ 363.50**	**$ 263.50**

Alberta
LEARNING

2003- 2004 PROGRAM UNIT FUNDING APPLICATION
EARLY CHILDHOOD SERVICES

Refer to Part 1, Section 1.7 (School Jurisdictions) and Part 2, Section 2.5 (Private ECS Operators) of the Funding Manual For School Authorities for information on the completion of this application.

Submit one copy of this application for each school/centre to School Finance.

Name of School Jurisdiction/Private School/Society: ______________________

Name of School/Centre: ______________________

Address: ______________________ **Postal Code:** ____________

Contact Person: ______________________ **Telephone No:** ____________

Fax No: ____________ **E-Mail Address:** ____________

Number of Program Unit children: (claimed on this application) ☐

Budget Amount: (for this application) $ ☐

Have any of these Program Unit children been with a previous operator? ☐ **YES** ☐ **NO**

Has Basic Instruction funding been claimed for these children? ☐ **YES** ☐ **NO**

NOTE:
- o The Budget amount is subject to change upon review by the Alberta Learning staff.
- o Final payments will be based on the lesser of the approved budget amount, funding ceiling or actual expenditures.

DECLARATION

The undersigned does hereby declare that an individualized program has been developed and will be carried out for each child on this application and that:

- The parent(s) / guardian(s) of each child in this program unit is/are fully aware that special program plans are in place and that this application is being submitted on the child's behalf.
- Each child has been identified through screening and assessment carried out by community health nurses, parent(s) / guardian(s), teachers and/or child development specialists in accordance with criteria outlined in or Part 1, Section 1.7 or Part 2, Section 2.5 of the Funding Manual For School Authorities.
- Program goals for each child have been developed on the basis of recommendations arising from screening and assessment data.
- A program consistent with the special needs of each child will be undertaken by the teacher(s), assisted by appropriate support staff in the most enabling educational environment.
- Consultative assistance will be provided to staff and parent(s) / guardian(s) as required.
- Direct services will be provided to each child and/or parent(s) / guardian(s) as required.
- Case conferences will be held regularly to evaluate each child's progress and to decide on changes, where appropriate, in the program in consultation with the parent(s) / guardian(s).
- long term plans for the child(ren) have been discussed with the receiving school authority(ies)

I certify that the programs identified in this report are being offered in accordance with Alberta Learning program requirements and that, to the best of my information and knowledge, the information provided on this application is correct.

______________________ **(Signature of Secretary-Treasurer)**

______________________ **(Date)**

FOR DEPARTMENT USE:

APPROVED BY: ______________________
(Signature of Performance Certifier)
Special Programs Branch

Amount Approved: $ ____________

____
(Signature of Expenditure Officer)
School Finance Branch

Date Approved: ____________

Descriptions of Severe Disabling Conditions

Severe Cognitive Disability (Code 41)

A **child** with a severe cognitive disability is one who:

a) has severe delays in all or most areas of development
b) frequently has other disabilities including physical, sensory, medical and/or behavioural
c) requires constant assistance and/or supervision in all areas of functioning including daily living skills and may require assistive technology
d) should have a standardized assessment which indicates functioning in the severe to profound range (standardized score of 30 ± 5 or less). Functional assessments by a qualified professional will also be considered in cases where the disabilities of the **child** preclude standard assessments; and
e) has scores equivalent to the severe to profound levels on an adaptive behavioural scale (e.g., AAMR Adaptive Behaviour Scales-School: Second Edition (ABS-S:2), Vineland Adaptive Behaviour Scales, Scales of Independent Behaviour - Revised)

Severe Emotional/Behavioural Disability (Code 42)

A **child** with a severe emotional/behavioural disorder is one who:

a) displays chronic, extreme and pervasive behaviours which require close and constant adult supervision, high levels of structure, and other intensive support services in order to function in an educational setting. The behaviours significantly interfere with both the learning and safety of the **child** and other children. For example, the **child** could be dangerously aggressive and destructive (to self and/or others), violent and/or dangerously compulsive; and
b) has either a diagnosis or a statement by a qualified professional indicating that the **child** experiences severe behavioural difficulties.

A clinical diagnosis within the last 2 years of a severe emotional/behavioural disorder by a psychiatrist, chartered psychologist or a developmental pediatrician is required, in addition to extensive documentation on the nature, frequency and severity of the disorder by **school authorities**. In the case of an ECS **child** who is not currently placed in an educational environment, extensive documentation of the nature, frequency, and severity of the disorder by the referring specialist may suffice. The effects of the disability on the **child's** functioning in an education setting should be described. An ongoing treatment plan/behaviour plan should be available and efforts should be made to ensure that the child has access to appropriate mental health and therapeutic services.

A clinical diagnosis of a severe emotional/ behaviour disorder is not necessarily sufficient to qualify under this category. Some diagnoses with behavioural components that are not sufficient to qualify are: Attention-Deficit/Hyperactivity Disorder (AD/HD), Attention Deficit Disorder (ADD).

Note: ECS **children** diagnosed with Fetal Alcohol Spectrum Disorder (FASD) in the most severe cases should be reported under Code 44 rather than Code 42.

Severe Multiple Disability (Code 43)

A **child** with multiple disabilities is one who:

a) has two or more non-associated moderate to severe cognitive and/or physical disabilities which, in combination, result in the child functioning at a severe to profound level; and
b) requires significant special programs, resources and/or therapeutic services.

Children with a severe disability and another associated disability should be identified under the category of the primary severe disability. For example:

- A child with a severe cognitive disability and another associated disability is not designated under this category, but is designated under severe cognitive disability.
- A child with a severe emotional/behavioural disability and another associated disability is not designated under this category, but is designated under severe emotional/ behavioural disability.

The following mild/moderate disabilities cannot be used in combination with other disabilities to qualify under code 43:

a) Attention Deficit / Hyperactivity Disorder (AD/HD)
b) Emotional/Behavioural Disabilities

Note: ECS children diagnosed with Down Syndrome in the most severe cases, should be reported under Severe Multiple Disability (Code 43)

Severe Physical or Medical Disability - including Autism (Code 44)

A child with a severe physical, medical or neurological disability is one who:

a) has a medical diagnosis of a physical disability, a specific neurological disorder or medical condition which creates a significant impact on the child's ability to function in the school environment (note: some physical or medical disabilities have little or no impact upon the child's ability to function in the school environment); and
b) requires extensive adult assistance and modifications to the learning environment in order to benefit from schooling.

A child with severe autism or other severe pervasive developmental disorder is included in this category. A clinical diagnosis by a psychiatrist, chartered psychologist, or medical professional specializing in the field of autism is required. A clinical diagnosis of autism is not necessarily sufficient to qualify under this category. Eligibility is determined by the functioning level of the child with autism.

In order for a diagnosis of autism to be made, the child needs to demonstrate impairment in the following areas:

- social interaction
- communication; and
- stereotyped pattern of behaviour (i.e. hand flapping, body rocking, echolalia, insistence on sameness and resistance to change).

A child diagnosed with severe Fetal Alcohol Spectrum Disorder (FASD) may have Fetal Alcohol Syndrome (FAS) or Alcohol-Relat Neurodevelopmental Disorder (ARND) and is included in this category (Code 44 – Severe Physical or Medical Disability – Includ Autism). A clinical diagnosis by a psychiatrist, chartered psychologist with specialized training, or medical professional specializing in developmental disorders is required. A clinical diagnosis of FASD is not necessarily sufficient to qualify under this category. Eligibility is determined by the functioning level of the child with FASD. Children with severe FASD who exhibit significant impairment in the areas of social functioning, life skills, behaviour, learning, attention and concentration, will need extensive intervention and support.

Deafness (Code 45)

A child with a profound hearing loss is one who:

a) has a hearing loss of 71 decibels (dB) or more unaided in the better ear over the normal speech range (500 and 4000 hertz (Hz)) which interferes with the use of oral language as the primary form of communication or has a cochlear implant preceded by a 71 dB hearing loss unaided in the better ear; and
b) requires extensive modifications and specialized educational supports; and
c) has a diagnosis by a clinical or educational audiologist. New approvals require an audiogram within the past 3 years.

If a child has a severe to profound sensori-neural hearing loss that has not changed significantly since the initial approval by Alberta Learning, documentation from a qualified specialist in the field of deafness outlining the severity of the hearing loss and modifications to the learning environment may be sufficient to support eligibility.

Blindness (Code 46)

A child with severe vision impairment is one who:

a) has corrected vision so limited that it is inadequate for most or all instructional situations, and information must be presented through other means; and
b) has a visual acuity ranging from 6/60 (20/200) in the better eye after correction, to having no usable vision or field of vision reduced to an angle of 20 degrees.

If a child has a severe to profound visual impairment that has not changed significantly since the initial approval by Alberta Learning, documentation from a qualified specialist in the field of vision outlining the severity of the disability and modifications to the learning environment may be sufficient to support eligibility

For those children who may be difficult to assess (e.g. cortical blindness – developmentally delayed), a functional visual assessment by specialist in the field of vision or a medical professional may be sufficient to support eligibility.

Severe Communication Disorder (Code 47) - For ECS children only.

A **child** with a severe communication disorder has severe difficulty in communicating with peers and/or adults because of a severe disorder in expressive and/or receptive language and/or total language. This typically includes little, if any, expressive or receptive communication skills.

REVISED

Children who experience a severe communication disorder, as defined here, and have sufficient communicative ability to permit formal speech/language assessment should demonstrate results less than or equal to the first percentile in expressive and/or receptive language and/or total language. Parental report and/or observational measures in conjunction with a description of the **child's** communication ability may be used if formal language assessment is not possible. These results should indicate that the **child** has very limited communication skills, or has an age equivalent on receptive and/or expressive language equal to or less than one half the **child's** chronological age. Results that are at or below the first percentile, on individual components of language (i.e. sentence structure, word structure, sentence recall, etc.) do not meet Alberta Learning criteria for a severe communication disorder.

Children whose primary language disorder is in the area of phonology are considered to meet criteria for Severe Communication disorder under the following conditions:

- A current speech/language assessment identifies the severity of the **child's** phonological delay as falling in the severe to profound range.
- The phonological delay is accompanied by delays in the **child's** receptive and/or expressive language.
- The phonological delay significantly impacts the child's intelligibility.
- The impact of the **child's** total language difficulties is such that extensive supports and services are required in order for the **child** to function within an ECS setting.
- A phonological delay significantly impacts the **child's** acquisition of early literacy, language concepts and/or social use of language and therefore must be addressed through the educational component of the **child's** program (IPP).

A speech-language assessment report completed within six months prior to the day the child begins his/her program must be submitted with the PUF application.

REVISED

To facilitate communication skills, these children may benefit from small group work or clustering with peers of the same age, and a 47 hour program may be sufficient.

If a child has a moderate to severe disability in a non-associated category (in addition to having a moderate to severe communication disorder), then the child would be more appropriately identified as Severe Multiple Disability (Code 43). This only applies for eligible ECS children and does not apply for students in grades 1 to 12.

DETAILS OF CHILDREN IN PROGRAM UNIT(S)

	Alberta Learning ID #	Name of Child Surname/Given Name(s)	Age	Date of Birth			Location(s) of Child's Program	R or N*	**Assessed Primary Disability Code	Date Program Starts			Date Program Ends			Number of Centre Program Hours	In-Home Programs***	
			Dept Use Only	Yr.	Mo.	Day				Yr.	Mo.	Day	Yr.	Mo.	Day		Total # of Visits	otal # o Visit Hours
		FIRST PROGRAM UNIT																
1.																		
2.																		
3.																		
4.																		
5.																		
6.																		
		SECOND PROGRAM UNIT																
1.																		
2.																		
3.																		
4.																		
5.																		
6.																		
		THIRD PROGRAM UNIT																
1.																		
2.																		
3.																		
4.																		
5.																		
6.																		
		FOURTH PROGRAM UNIT																
1.																		
2.																		
3.																		
4.																		
5.																		
6.																		

* In this column please indicate whether it is:
(R) - for a renewal application;
(N) - for a new application.

** Refer to assessed primary disability by Code; i.e., Code 41 Severe Mental Disability, Code 42 Severe Emotional/Behavioral Disability, Code 43 Severe Multiple Disability, Code 44 Severe Physical or Medical (including autism) Disability, Code 45 Deafness, Code 46 Blindness and Code 47 Severe Communication Disability.

For code 44, if the child has autism or other pervasive developmental disorders, also write in specific disability in the space provided.

*** Please show the total number of eligible home visits for the school year and the total number of hours these visits comprise.

PROGRAM UNIT FUNDING (PUF) BUDGET

PLEASE SUBMIT A SEPARATE BUDGET FOR EACH UNIT **NAME(S)**______________________________

PROGRAM UNIT COSTS

INSTRUCTIONAL COSTS

Salaries and Wages (# of hours_______X_________rate per hour) $______________
(# of hours should not exceed the child's program hours by more than 10%)

Employer's Portion of Fringe Benefits $______________

Services Purchased (Please specify service with # of hours and rate per hour) $______________

Supplies and Materials (Please attach a list if > $500 per child) $______________

PARENT INSERVICE – please specify ________________________ $______________

STAFF INSERVICE – please specify ________________________ $______________

TRANSPORTATION COSTS:

- Transportation: to and from school # trips_____X $_______ ________
- In-Home Programs # visits_____X $_______ ________
- Other: - Field Trips ________
- In-Program Transportation ________

Total Transportation Costs ________(A)

LESS: TRANSPORTATION REVENUES

Alberta Learning Special Needs Transportation Funding: (See Funding Manual, Part 2, Section 2.6 and 2.7 for Private ECS Operators and Part 1, Sections 1.17 - 1.20 for School Jurisdictions.)

- Special Transportation # trips _____ X $11.74 ________
- Regular Transportation # children _____ X $436/yr ________
- In-Home Transportation # visits _____ X $11.74 ________
- Other Transportation Revenues (i.e., fees) ________

Total Transportation Revenues ________(B)

NET TRANSPORTATION COSTS: (Costs (A) less Revenues (B), if difference is negative enter 0) $______________

CAPITAL COSTS (child specific only)

Furniture and Equipment: Please specify: ______________________________ $______________

Note: Please attach, to this application, a letter of recommendation from an appropriate specialist supporting the capital purchase.

TOTAL PROGRAM UNIT COSTS $______________

Guidelines for the above expenditure areas are found in the Funding Manual, Part 1, Section 1.7 or Part 2, Section 2.5

DEPT. USE ONLY **CEILING AMOUNT** (based on program hours and # of home visits) ______________

RETURN TO: SCHOOL FINANCE BEFORE JANUARY 2

TOTAL ECS PROGRAM BUDGET FOR
DESIGNATED SPECIAL EDUCATION ECS PROGRAMS APPLYING FOR PROGRAM UNIT FUNDING (PUF)

	ECS PROGRAM COSTS
INSTRUCTIONAL COSTS	
Salaries and Wages (Please attach breakdown of # of teachers, aides, etc. and costs)	$________________
Employer's Portion of Fringe Benefits	$________________
Services Purchased (Please attach breakdown of type of service and cost)	$________________
Supplies and Materials (Please attach a list if > $500 per child)	$________________
PARENT INSERVICE	$________________
STAFF INSERVICE	$________________

TRANSPORTATION COSTS:

- Transportation: to and from school # trips______ X $______ __________
- In-Home Programs # visits______ X $______ __________
- Other: - Field Trips __________
- In-Program Transportation __________

Total Transportation Costs __________(A)

LESS: TRANSPORTATION REVENUES

Alberta Learning Special Needs Transportation Funding: (See Funding Manual, Part 2, Sections 2.6 and 2.7 for Private ECS Operators and Part 1, Sections 1.17 - 1.20 for School Jurisdictions)

- Special Transportation # trips _____ X $11.74 __________
- Regular Transportation #children _____ X $436/yr. __________
- In-Home Transportation # visits _____ X $11.74 __________
- Other Transportation Revenues __________

Total Transportation Revenues __________ (B)

NET TRANSPORTATION COSTS: **(Costs (A) less Revenue (B), if difference is negative, enter $0) =**	$________________
FACILITY COSTS: (Please attach a list of costs)	$________________
ADMINISTRATION: Please attach a breakdown of costs)	$________________
CAPITAL COSTS:	
Furniture and Equipment: (Please attach a list of costs)	$________________

TOTAL ECS PROGRAM COSTS $________________

LESS: APPLICABLE REVENUES

AB. Learning Basic Instruction	$______________
Mild or Moderate	$______________
Plant Operation and Maintenance	$______________
AB. Learning Other (please attach a list)	$______________
ECS Administration -(Applies only to private ECS operators)	$______________
Other Revenues (please specify)	$______________

TOTAL REVENUES $(________________)

NET ECS PROGRAM COSTS ELIGIBLE FOR PROGRAM UNIT FUNDING (total costs minus total revenues) $________________

Guidelines for the above expenditure areas are found in the Funding Manual, Part 1, Section 1.7 or Part 2, Section 2.5

DEPT. USE ONLY: CEILING AMOUNT (based on children's program hours and number of home visits) $________________

Alberta
LEARNING

EARLY CHILDHOOD SERVICES

ECS PROGRAM UNIT FUNDING STATEMENT OF ACTUAL EXPENDITURES FOR SCHOOL JURISDICTIONS 2003-2004 SCHOOL YEAR

NAME OF SCHOOL JURISDICTION: ______________________________

- Complete only one statement of actual expenditures for all Program Unit Funded (PUF) children (except designated special education ECS programs).
- School jurisdictions with approved Designated Special Education ECS programs should complete a separate form for each designated program.
- Final payment of Program Unit Funding will be based on the lesser of actual expenditures, approved budget amount, and ceiling amount.
- Guidelines for expenditures are found in the Funding Manual for School Authorities, Part 1, Section1.7.

Contact Name: ______________________ Telephone No. ______________

CERTIFICATION

FUNDING CALCULATION:

i) Actual Expenditures (from p. 2) $____________

ii) Approved Budgets Total (dept. only) $____________

iii) Funding Ceiling Total (dept. only) $____________

I certify that the information reported on this form is correct and that the above costs have not been claimed under any other program.

______________________________ ______________

(Signature of Secretary-Treasurer) **(Date)**

FOR DEPARTMENT USE ONLY:

Allocation Approved $______________

APPROVED BY: ______________________________ ______________

(Signature of Expenditure Officer) **(Date)**

03AL2.5b **RETURN TO: SCHOOL FINANCE by OCTOBER 15**

Alberta
LEARNING
EARLY CHILDHOOD SERVICES

ECS PROGRAM UNIT FUNDING
STATEMENT OF ACTUAL EXPENDITURES
2003/2004 SCHOOL YEAR
FOR SCHOOL JURISDICTIONS

NAME OF SCHOOL JURISDICTION: ______________________________

	ACTUAL EXPENDITURES
INSTRUCTION	
Salaries and Wages	____________
Employer's Portion of Fringe Benefits	____________
Services Purchased	____________
Supplies and Materials	____________
PARENT INSERVICE/STAFF INSERVICE	____________

TRANSPORTATION COSTS:

	Actual Cost **(A)**	**Revenue** **(B)**
To and From School	____________	____________
In-Home Visits	____________	____________
Other	____________	____________
TOTALS	____________	____________

NET Transportation Costs: (A) - (B) (if difference is negative, enter 0) ____________

ADMINISTRATION COSTS (for Designated Sp. Ed. ECS Operators only) ____________

CAPITAL: FURNITURE AND EQUIPMENT -
(ONLY capital equipment approved on a budget should be claimed.
Please attach a list of capital items purchased indicating the child's name beside each. ____________

TOTAL ECS PUF EXPENDITURES $ ____________

FOR DESIGNATED SPECIAL EDUCATION ECS PROGRAMS ONLY

- Please indicate the number of ECS children enrolled on Sept. 30 for this program ____________

Basic Instruction and any other applicable revenues for these children will be applied to the total program costs and the net costs will eligible for program unit funding.

Alberta
LEARNING

APPLICATION FORM
EARLY CHILDHOOD SERVICES TRANSPORTATION
2003 – 2004 School Year

TRANSPORTATION AS OF SEPTEMBER 30

____
Name of Private ECS Operator or Metro Urban School Jurisdiction

INSTRUCTIONS:

Complete this form using:

- **(a)** the number of children with disabilities being transported.
- **(b)** the number of days transported.
- **(c)** the number of regular children being transported.
- **(d)** the number of planned in-home visits.

DATE PROGRAM BEGINS: ____________ **DATE PROGRAM ENDS:** ____________

1 Regular Transportation (private ECS operators only)
Number of eligible transported ECS children transported by a school bus, public transit system, or parent. ____________ X $436 = $ ____________

2 Special Transportation
Total number of days transported for all ECS children with disabilities requiring special transportation. ____________ X $11.74 = ____________

Number of special needs children requiring special transportation. ____________

3 In-Home Visits
Total number of in-home visits for all ECS children with special needs. ____________ X $11.74 = $ ____________

Number of special needs children home visits are provided for. ____________

CERTIFICATION

I certify that to the best of my information and knowledge, the number of children transported, the number of in-home visits, and the number of days transported, are accurate.

______________________________ **(Signature of Secretary-Treasurer)**

______________ **(Date)**

03AL2.6 **RETURN TO: SCHOOL FINANCE by December 1**

Alberta
LEARNING

APPLICATION FOR RESIDENT STUDENTS OF THE GOVERNMENT AT FUNDED PRIVATE SCHOOLS

For the School Year: September 1, 2003 to August 31, 2004

This funding is no longer available for new students; however, it continues for resident students of the government who were approved in 1997/1998 and who continue to attend a funded private school

NAME OF SCHOOL AUTHORITY: ______________________________

NAME OF CONTACT PERSON: ____________________ **TELEPHONE:** __________

Notification of Resident Student forms from Family and Social Services are required for all Resident Students of the Government, except for contract programs where all students are Resident Students of the Government.

Please indicate whether this is a Budget or a Final claim, by checking the appropriate box.

☐ **BUDGETED COSTS** ☐ **FINAL COSTS**

There are two ways to claim this grant:

1. If you have a set annual fee for the type of program required, please indicate the fee in column (A); column (b) should be the annual fee prorated for the length of time the student is in the program.
2. If you do not have a set annual fee, then page 2 of this form will assist you in calculating the net cost.

STUDENT'S NAME	PROGRAM ENTRY DATE YY/MM/DD	PROGRAM ENTRY DATE YY/MM/DD	GRADE	TYPE OF PROGRAM	CLAIM AMOUNT (A) ANNUAL FEE	CLAIM AMOUNT (B) NET COST
If more space is required please attach additional form.				**TOTAL**	$	$

NOTE: Only claim Resident Students of the Government in Therapeutic Foster Care if there are two or more students in the home.

CERTIFICATION

I certify that the private school funded students identified in this report are Resident Students of the Government as per Section 44(7) of the *School Act* (RSA 2000), and that the programs identified in this report are being offered in accordance with Alberta Learning's program requirements.

______________________________ (Signature of Superintendent or Designate)

______________ (Date)

I certify that to the best of my information and belief the information contained in this report is for the purpose of determining the funding payable by Alberta Learning is correct.

______________________________ (Signature of Secretary-Treasurer)

______________ (Date)

DEPARTMENT USE ONLY:

Total Number of Resident Students of the Government = __________ Total Annual Fees or Net Costs = $__________

______________________________ (Performance Certifier)

______________ (Date)

______________________________ (Expenditure Officer)

RESIDENT STUDENTS OF THE GOVERNMENT

Net cost is calculated by subtracting all funding received from Alberta Learning from the total cost of the program:

Student Name: ______________________ **Alberta Education ID #** __________

Type of Program: ____

EDUCATION COSTS:

Please indicate the type and dollar amount of each cost associated with the student:

EXPENDITURES

Instruction: $ ______________

Transportation: $ ______________

Other Costs:
(Please specify)

______________ $ ______________

______________ $ ______________

______________ $ ______________

TOTAL COST: **(1)** **$** ______________

REVENUES:

Less:

Alberta Education Funding:

Basic Instruction $ ______________

Transportation $ ______________

Other Funding:
(Please specify)

______________ $ ______________

______________ $ ______________

______________ $ ______________

TOTAL FUNDING RECEIVED: **(2)** **$** ______________

NET COST = (1) MINUS (2) **$** ______________

Alberta
LEARNING

CAPITAL LOAN INFORMATION

CAPITAL LOANS For the School Year: September 1, 2003 to August 31, 2004

Date		Amount		Amount		Term	Interest Rate	Outstanding Supported Balance August 31, 2003	Supported Principal (A)	Supported Interest (B)	TOTAL (A) + (B)
Authorized	Borrowed	Authorized	Borrowed	Eligible	Ineligible						
								TOTAL CAPITAL LOANS			

CERTIFICATION

I hereby certify to the best of my information and knowledge the Capital Loan Information on this application form is correct.

(Signature of Secretary-Treasurer) (Date)

(Name of School Jurisdiction)

03AL5.2 RETURN TO: SCHOOL FINANCE by October 24

Alberta
LEARNING

SuperNet Access Funding Application

For the School Year: September 1, 2003 to August 31, 2004

Name of School Authority: ______________________________

Authority Code: ______________

Contact Name/Phone/Email: ______________________________

School Code (if applicable)	Site Name	Site Address	SuperNet Connection Date	Monthly SuperNet Service Charge

CERTIFICATION

I certify that to the best of my information and knowledge that the information reported on this form is correct.

______________________________ ______________
(Signature of Secretary-Treasurer/Superintendent) (Date)

Approved by______________________________ ______________
(STB) (Date)

03AL5.4 **RETURN TO: STAKEHOLDER TECHNOLOGY BRANCH (STB) before August 31, 2004**

Alberta
LEARNING

REGIONAL CONSORTIUM
STATEMENT OF REVENUES AND EXPENSES
for the Year Ended August 31, 2004

(in dollars)

NAME:____

	Budget 2003 -2004	Actual 2003 -2004	Actual 2002 -2003
REVENUES			
Alberta Learning			
Regional Consortium			
Establishment and Maintenance			
Total Alberta Learning			
Other Revenue			
Funds from Accumulated Surplus			
Total Revenues			
EXPENSES			
Professional Development & In Service			
Salaries, wages and benefits			
Services, contracts and supplies			
Other (Please specify)			
Board of Director Expense			
Meeting fee			
Services, contracts and supplies			
Travel and Subsistence			
Total Expenses			
Revenues less Expenses – Surplus (Deficit)			

Note: Please ensure that any current year deficit is offset by sufficient funds in the Accumulated Surplus as shown in the Statement of Financial Position.

CERTIFICATION

I certify to the best of my information and knowledge that the information identified above is correct.

____
Financial Officer

____
Date

____
Chair (Regional Consortium)

____
Date

03AL5.5a

PLEASE RETURN TO SCHOOL FINANCE BY DECEMBER 1, 2004

Alberta
LEARNING

REGIONAL CONSORTIUM
STATEMENT OF FINANCIAL POSITION
as at August 31, 2004
(in dollars)

NAME: ______________________________

	2003	2002
ASSETS		
Current assets		
Cash and temporary investments		
Accounts receivable (net after allowances)		
Province of Alberta		
Other Alberta school jurisdictions		
Other		
Prepaid expenses		
Other current assets		
Total current assets		
LIABILITIES		
Current liabilities		
Bank indebtedness		
Accounts payable and accrued liabilities		
Province of Alberta		
Other Alberta school jurisdictions		
Other		
Total current liabilities		
NET ASSETS		
Accumulated surplus(deficit)		
Uncommitted surplus(deficit)		
Operating reserves		
Total net assets		
Total net assets and current liabilities		

CERTIFICATION

I certify to the best of my information and knowledge that the information identified above is correct.

____
Financial Officer

____
Date

____
Chair (Regional Consortium)

____
Date

03AL5.5b **PLEASE RETURN TO: SCHOOL FINANCE BY DECEMBER 1, 2004**

Alberta
LEARNING

INSTITUTIONAL PROGRAMS
Funding Application Form
2003/2004

For the School Year: September 1, 2003 to August 31, 2004

NAME OF SCHOOL AUTHORITY: ______________________________

CONTACT PERSON: ______________________________ **TELEPHONE:** ______________

Please indicate whether this is a budget or final costs claim by checking the appropriate box.

☐ **BUDGET** ☐ **FINAL COSTS**

Name of Program	School Code	Net Program Costs

CERTIFICATION

I certify that the students claimed for this funding reside in an institution and are resident students of the Government as per Section 44 (7) of the *School Act* (RSA 2000) or are temporary residents of a women's shelter. I also certify that the Institutional program(s) are under contract to Alberta Learning or have had prior approval from the Special Programs Branch of Alberta Learning, and that the programs identified in this report are being offered in accordance with Alberta Learning's program requirements.

______________________________ ______________
(Signature of Superintendent or Designate) (Date)

I certify that to the best of my information and knowledge, the information contained in this report for the purpose of determining the grant payable by Alberta Learning is correct.

______________________________ ______________
(Signature of Secretary Treasurer) (Date)

DEPARTMENT USE ONLY:

Total Net Program Costs = $ ______________

______________________________ ______________
Performance Certifier Date

______________________________ ______________
Expenditure Officer Date

Alberta
LEARNING

REGULAR INSTITUTIONAL PROGRAMS
BUDGETED / FINAL COSTS
2003/2004

NAME OF PROGRAM: ____

CONTACT PERSON: ______________________ **TELEPHONE:** ________________

Please see Instructions (attached) for completion of this form. Also see section 6.1 of the 2003-2004 Funding Manual for School Authorities. Note: if your program has some non-institutional students, you are considered a Mixed Institutional Program and must complete the form for Mixed Institutional Programs rather than this form.

		FTE's		
1.	**Instructional Salaries costs**			
	a. Certificated Salaries & Benefits	________	$________________	
	b. Uncertificated Salaries & Benefits	________	$________________	
	c. Substitute Teacher(s)	________	$________________	
	Total Instructional Salary Costs		$________________	
2.	**Supplies and Services costs**			
	a. Professional Development		$________________	
	b. Educational Supplies		$________________	
	c. Education Services		$________________	
	d. Office Supplies		$________________	
	Total Supplies and Services Costs		$________________	
3.	**Technology costs** (see guidelines for formula)		$________________	
TOTAL PROGRAM COSTS			$________________	A

REVENUES RECEIVED FOR INSTITUTIONAL STUDENTS (not including Institutional Funding)

Note: please do not include plant operations and maintenance funding, system administration funding or institutional funding.

1.	**Basic Instruction** (based on Sept 30 enrolments of 550 coded students)	$________________	
2.	**Other funding (please specify)** ______________________	$________________	
TOTAL REVENUES		$________________	B
NET PROGRAM COSTS (Total Program Costs less other revenues **(A – B = C.)**		$________________	C
Average number of students enrolled		________________	D

To calculate the average number of students enrolled:

Step 1: Determine the number of students enrolled **for each month** that the program operated. Note: students who are enrolled for more than one month will be counted for each month attended (i.e., if a student attends the program for 3 months, then the student would be counted for each of the 3 months attended). For 2003-2004 Budgets, please use monthly enrollments from the 2002-2003 school year. For 2003-2004 Finals, please use monthly enrolments for the 2003-2004 school year.

Step 2: Add up the enrolments for each month to get an annual total.

Step 3: Divide the annual total by the number of months the program operated to calculate the average number of students enrolled.

For Final claims, please attach a list of institutional students (with student ID #'s) who were in attendance on September 30, 2003.

Instructions for Completion of 2003-2004 Institutional Funding Applications

Important: There **are two categories of institutional programs**; **Regular and Mixed programs**. Regular institutional programs only have institutional students (i.e., students who were placed in the institution by a government agency and they reside in the institution). Programs of this type should complete the Regular Institutional Program form. Mixed institutional programs have both institutional students and non-institutional students. Non-institutional students are students who were not placed by a government agency and do not reside in the institution (i.e., day students, students placed by the school jurisdiction, tuition students from another school jurisdiction or tuition students from out-of -province.) Programs of this type should complete the Mixed Institutional Program form.

1. **Instructional Salary Costs**
   a. Certificated Salaries & Benefits: teacher/school administration salaries & benefits
   b. Uncertificated Salaries & Benefits: teacher assistants & office staff,
   c. Substitute Teacher(s): costs for subs when teachers or teacher assistant are not in school
2. **Supplies and Services Costs**
   a. Professional Development: staff training, conferences, & in-services
   b. Educational Supplies: materials & resources which students/teachers require for the educational program, such as; textbooks, notebooks, videos, pens/pencils etc.
   c. Educational Services: costs for educational or psychological assessments directly related to providing the educational program such as; reading, math, I.Q., fine motor/gross motor
   Note: Counseling, therapy or psychiatric services are not to be included in this category as these are the responsibility of the government agency operating the institution.
   d. Office Supplies: materials for the administration of the school program such as; paper, pens, binders, files.
   Note: Office capital equipment such as audio-visual equipment, copiers, staff computers, furniture, fixtures for the classroom or office are **not** to be included in this category as these costs are the responsibility of the government agency operating the institution.
3. **Technology Costs**
   Computers and computer upgrades, peripherals (printers for instructional use, peripherals for special needs students), technical support, and software for teacher and student use that supports the learner outcomes identified by Alberta Learning. Technology costs will be calculated using the lesser of the following amounts:
   a. Actual costs
   b. (i) For regular institutional programs that have only institutional students, $500 X the average number of students enrolled (line D of the budget form).
   (ii) For mixed programs (i.e., programs with institutional students and non-institutional students), $500 X the average number of institutional students enrolled (line D of the budget form).
   c. Maximum of $10,000 total per year. Requests over the maximum amount require prior approval from the Education Manager for Institutions at the Special Programs Branch.

Revenues: Please list the Basic Instruction revenues you received (or plan to receive) for the institutional students who were enrolled on September 30 (note: these students should be coded as 550 in order to receive funding). List other funding you received for institutional students in your program, but do not include any Institutional Funding payments you have received. Also, do not include System Administration funding, as this funding is provided to cover central office/system administration costs (which are not to be included on this budget). For Mixed Institutional programs, please ensure that the revenues reported are only for institutional students. Revenues for non-institutional students should not be included.

Average Number of Students Enrolled:

To calculate the average number of students enrolled:

Step 1: Determine the number of students enrolled **for each month** that the program operated. Note: students who are enrolled for more than one month will be counted for each month attended (i.e., if a student attends the program for 3 months, then the student would be counted for each of the 3 months attended). For 2003-2004 Budgets, please use monthly enrolments from the 2002-2003 school year. For 2003-2004 Finals, please use monthly enrolments for the 2002-2003 school year.

Step 2: Add up the enrolments for each month to get an annual total.

Step 3: Divide the annual total by the number of months the program operated to determine the average number of students enrolled.

Average Number of Institutional Students Enrolled: (Mixed Programs only)

Use same formula as above for average number of students enrolled except only use the number of institutional students and do not include the non-institutional students who are enrolled

Alberta
LEARNING

MIXED INSTITUTIONAL PROGRAM
BUDGETED / FINAL COSTS
2003/2004

NAME OF PROGRAM: ______________________________

CONTACT PERSON: ____________________ **TELEPHONE:** ______________

Please see Instructions (attached) for completion of this form. Also see section 6.1 of the 2003-2004 Funding Manual for School Authorities. Note if your program only has institutional students (and no non-institutional students), you are considered a Regular Institutional Program and must complete the form for a Regular Institutional Program rather than this form.

		FTE's	
1.	**Instructional Salaries costs**		
	a. Certificated Salaries & Benefits	________	$__________
	b. Uncertificated Salaries & Benefits	________	$__________
	c. Substitute Teacher(s)	________	$__________
	Total Instructional Salary Costs		$__________
2.	**Supplies and Services costs**		
	a. Professional Development		$__________
	b. Educational Supplies		$__________
	d. Education Services		$__________
	d. Office Supplies		$__________
	Total Supplies and Services Costs		$__________
3.	**Technology costs** (see guidelines for formula)		$__________

TOTAL PROGRAM COSTS $__________ A

Average number of students enrolled (see guidelines for this calculation) __________ B

Average cost per student (A ÷ B) $__________ C

Average number of Institutional students enrolled (see guidelines) __________ D

PROGRAM COSTS FOR INSTITUTIONAL STUDENTS (C x D) $__________ E

REVENUES RECEIVED FOR INSTITUTIONAL STUDENTS (not including Institutional Funding)

Note: only show revenues for institutional students. Please do not include revenues for non-institutional students. Also, do not include plant operations and maintenance funding or system administration funding.

1. **Basic Instruction** (based on Sept 30 enrollments of 550 coded students) $__________
2. **Other funding (please specify)** ____________________ $__________

TOTAL REVENUES FOR INSTITUTIONAL STUDENTS $__________ F

NET PROGRAM COSTS FOR INSTITUTIONAL STUDENTS (E - F) $__________

Note: For Final claims, please attach a list of the institutional students (with student ID #'s) in attendance on Sept. 30

Instructions for Completion of 2003-2004 Institutional Funding Applications

Important: There **are two categories of institutional programs; Regular and Mixed programs.** Regular institutional programs only have institutional students (i.e., students who were placed in the institution by a government agency and they reside in the institution). Programs of this type should complete the Regular Institutional Program form. Mixed institutional programs have both institutional students and non-institutional students. Non-institutional students are students who were not placed by a government agency and do not reside in the institution (i.e., day students, students placed by the school jurisdiction, tuition students from another school jurisdiction or tuition students from out-of -province.) Programs of this type should complete the Mixed Institutional Program form.

1. **Instructional Salary Costs**
   - a Certificated Salaries & Benefits: teacher/school administration salaries & benefits
   - b Uncertificated Salaries & Benefits: teacher assistants & office staff,
   - c Substitute Teacher(s): costs for subs when teachers or teacher assistant are not in school
2. **Supplies and Services Costs**
   - a. Professional Development: staff training, conferences, & in-services
   - b. Educational Supplies: materials & resources which students/teachers require for the educational program, such as; textbooks, notebooks, videos, pens/pencils etc.
   - c. Educational Services: costs for educational or psychological assessments directly related to providing the educational program such as; reading, math, I.Q., fine motor/gross motor
     Note: Counseling, therapy or psychiatric services are not to be included in this category as these are the responsibility of the government agency operating the institution.
   - d. Office Supplies: materials for the administration of the school program such as; paper, pens, binders, files.
     Note: Office capital equipment such as audio-visual equipment, copiers, staff computers, furniture, fixtures for the classroom or office are **not** to be included in this category as these costs are the responsibility of the government agency operating the institution.
3. **Technology Costs**
   Computers and computer upgrades, peripherals (printers for instructional use, peripherals for special needs students), technical support, and software for teacher and student use that supports the learner outcomes identified by Alberta Learning. Technology costs will be calculated using the lesser of the following amounts:
   - a. Actual costs
   - b. (i) For regular institutional programs that have only institutional students, $500 X the average number of students enrolled (line D of the budget form).
     (ii) For mixed programs (i.e., programs with institutional students and non-institutional students), $500 X the average number of institutional students enrolled (line D of the budget form).
   - c. Maximum of $10,000 total per year. Requests over the maximum amount require prior approval from the Education Manager for Institutions at the Special Programs Branch.

Revenues: Please list the Basic Instruction revenues you received (or plan to receive) for the institutional students who were enrolled on September 30 (note: these students should be coded as 550 in order to receive funding). List other funding you received for institutional students in your program, but do not include any Institutional Funding payments you have received. Also, do not include System Administration funding, as this funding is provided to cover central office/system administration costs (which are not to be included on this budget). For Mixed Institutional programs, please ensure that the revenues reported are only for institutional students. Revenues for non-institutional students should not be included.

Average Number of Students Enrolled:

To calculate the average number of students enrolled:

Step 1: Determine the number of students enrolled **for each month** that the program operated. Note: students who are enrolled for more than one month will be counted for each month attended (i.e., if a student attends the program for 3 months, then the student would be counted for each of the 3 months attended). For 2003-2004 Budgets, please use monthly enrolments from the 2002-2003 school year. For 2003-2004 Finals, please use monthly enrolments for the 2003-2004 school year.

Step 2: Add up the enrolments for each month to get an annual total.

Step 3: Divide the annual total by the number of months the program operated to determine the average number of students enrolled.

Average Number of Institutional Students Enrolled: (Mixed Programs only)

Use same formula as above for average number of students enrolled except only use the number of institutiona students and do not include the non-institutional students who are enrolled

ACTIVITY PROGRAM for the purpose of funding is defined as a co-curricular activity outside of, but usually complimentary to, the regular curriculum and offering a high standard of professional training. This activity should be one requiring intensive training.

ALTERNATIVE FRENCH LANGUAGE PROGRAMS means a program offered under Sections 11 and/or 21(1)(a) of the *School Act* where French is used as the language of instruction.

- ECS – 238 hours (50 percent) of the instructional time using French as the language of instruction.
- Elementary – 475 hours (50 percent) of the instructional time using French as the language of instruction.
- Junior High – 380 hours (40 percent) of the instructional time using French as the language of instruction.
- Senior High – 250 hours (10 credits) per year using French as the language of instruction.

This is commonly referred to as French Immersion Programs

AUDITION for the purpose of funding means a trial performance in which an actor, singer, dancer or other performer demonstrates prowess in his or her abilities and the audition results are used to determine entry qualification.

BLENDED PROGRAM means an educational program consisting of two distinct parts:

1. A **school**-provided program where a teacher employed by a **school board** or accredited **private school** is responsible for providing the delivery and evaluation of courses; and
2. A Home Education Program that meets the requirements of the *Home Education Regulation.*

BOARD means the board of trustees of a district, **division**, or Francophone Regional Authority.

CHALLENGE ASSESSMENTS for the purpose of claiming credit enrolment units (CEUs) are available for high school courses. Local **school authorities** may use **challenge assessments** to provide students with a means of receiving credits and a final mark for courses in which they already possess the knowledge, skills and attitudes identified in the program of studies and when this assessment is in the students' best interests.

CHARTER means a charter approved under Section 34(1) of the *School Act.*

CHARTER BOARD means the society, or company that is named in a **charter** as the operator of a **charter school**.

CHARTER SCHOOL means a **school** established under Section 32 of the *School Act*.

New

For the 2003-2004 school year, the following charter schools have been approved:
-Almadina School Society
-Aurora Charter School Ltd.
-Boyle Street Education Centre
-Calgary Arts Academy Society
-Calgary Girls School Society
-Calgary Science School Society
-CAPE – Centre for Academic and Personal Excellence Institute
-Foundations for the Future Charter Academy School Society
-Moberly Hall School Society
-Mother Earth Children's Charter School Society
-Suzuki Charter School Society
-Westmount Charter School Society

CHILD is an individual whose **parent** is a resident of Alberta, and is a Canadian citizen; or

1. Lawfully admitted to Canada for permanent residence;
2. A child of a Canadian citizen; or
3. A child of an individual who is lawfully admitted to Canada for permanent or temporary residence; and
4. Who is eligible to attend an **Early Childhood Services (ECS) program** according to the table below.

Revised

Needs of Eligible Children	ECS Funding (maximum years provided)	*Minimum age of the child on September 1 of the school year must be:
Regular	Basic (1 year funding)	4 years 6 months
Mild or Moderate Disabilities and Gifted and Talented	Basic and Mild/Moderate (2 years funding)	3 years 6 months
Severe Disabilities	Basic and Program Unit (3 years funding)	2 years 6 months
Developmentally Immature	Basic (2 years funding)	5 years 6 months

*ECS operators need to take into consideration the grade one **school** entrance age in the community when enrolling **children** in an ECS program. **Children** with severe disabilities will be funded for a maximum of three years while they are of ECS age. **Children** with a mild or moderate disability and **children** who are gifted and talented will be funded for a maximum of two years while they are of ECS age.

This definition does not include a **First Nations child**, but does include a **child** attending an ECS program operated by the Government of Canada or any agency of the Government of Canada or a council of a band as defined in the *Indian Act* (Canada) or any agency established by a council of a band or councils of bands with which the Alberta **school jurisdiction** has an agreement under Section 62(2)(b) or (c) of the *School Act* for the individual.

New

5. An individual who is at least 5 years 6 months but less than 6 years of age on September 1 may be counted as an **ECS child** (rather than as a **funded student**) if the **school jurisdiction**, the **ECS operator** and the **parent** agree that an **ECS program** is the most appropriate placement and if one of the following applies.

   a) the **child** has spent less than the number of years in the program for which they are eligible for funding, i.e. has received less than three years of Program Unit funding (PUF),

   b) the **child** has not enrolled in an **Early Childhood Services (ECS) Program** prior to this age; or

   c) the **child** has been assessed as **developmentally immature**.

New

6. Individuals 6 years or older, but less than 7 years old on September 1 who are in an **ECS program** and who are **developmentally immature**, or who are **children** entering an **ECS** program for the first time, are to be counted as **children**.

   A **developmentally immature** individual is not considered to have special needs and should not have been identified as having special needs in prior years. If the individual has special needs then the individual is counted as a **funded student** for funding purposes.

New *CHILD WITH A DISABILITY* means a **child** who is assessed and coded as having a mild, moderate or severe disability.

Revised *CHILD WITH A MILD OR MODERATE DISABILITY* means a **child** who is assessed as having a mild or moderate cognitive disability, visual impairment, hearing impairment, emotional/behavioural disability, physical or medical disability, multiple disability, or communication disability.

New *CHILD WITH A SEVERE DISABILITY* see definition of **Students/ECS Children with Severe Disabilities** in the Glossary of Terms.

New *CHILD WITH SPECIAL NEEDS* means a **child** who requires an adapted or modified educational program to meet his or her exceptional needs. The **Individualized Program Plan (IPP)** provides documentation of the program and is a mandatory requirement for any child identified as a special needs child. This includes children with a mild, moderate, or severe disability and children who are gifted and talented.

COUNT DATE is used to determine eligibility for funding and refers to the specific date on which students and/or **children** should be counted. If the **count date** is September 30, only those enrolled on that date can be included in the count. If the

count date of September 30 falls on a weekend, the last **school** day in September shall be used as the **count date**.

DENSITY is a term used in Rural Transportation Block funding. The **density** rating for a **school jurisdiction** is calculated by dividing the **effective transportation area** in the jurisdiction by the number of weighted **eligible passengers** (**eligible passengers** multiplied by the **weighting factor** for each).

DESIGNATED SCHOOL is a term used in Rural Transportation Block funding. A **designated school** is the **school** in which a **board** has enrolled a student in accordance with Section 45(2) of the *School Act*.

DESIGNATED SPECIAL EDUCATION ECS PROGRAM means an **ECS program** in which at least 70 percent of the **children** served have a severe disability. **ECS programs** with this designation may include **children with mild or moderate disabilities** and/or regular ECS **children**, totaling a maximum of 30 percent of their ECS population. The following programs have been approved for this status:

Revised

School Jurisdictions	Schools
Black Gold Regional Division #18	Ecole Bellevue
	East Elementary Early Entry Program
Calgary School District #19	Knobb Hill Elementary School
	Queen Elizabeth Elementary
Edmonton School District #7	Glenrose School
	Hazeldean School
	Mayfield School
	Waverley School
	Scott Robertson School
	Tevie Millar Heritage School
	Evansdale School
	Homesteader School
	Elmwood School
Elk Island Public School Regional Division #14	REACH Program
Grande Prairie Public School District #2357	Crystal Park Pre-School Program
Greater St. Albert Catholic Regional Division #29	Vital Grandin School
	Vanier Elementary School
Medicine Hat School District #76	Harold Pre-School
	Riverside School
	Elm Street School
Medicine Hat Catholic #20	St. Louis Early Dev. Program
Parkland School Division # 70	Broxton Park
Pembina Hills Regional Division #7	Westlock Elementary Early Ed. Program
Rocky View School Division #41	Elizabeth Barrett School
Wetaskiwin Regional Division #11	Early Ed. Community Center (EEEC)

Designated ECS Programs in ECS Private Operators

- Calgary Quest Children's Society
- Children's Services Centre – Red Deer
- Community Options
- Connect Society DEAF Services
- Corbett Hall Early Education Program
- ECS Learning Association/Cause & Effect
- Elves Special Needs Society
- Family Linkages
- H.OM.E.S.- Home Opportunities for Multi-Handicapped Educational Services
- GRIT Calgary
- Horizon School
- New Heights Early Learning Services
- PACE
- Providence Child Development Centre
- Renfrew Educational Services
- Salvation Army Children's Village
- Society for the Treatment of Autism
- The Heartland Agency
- The PREP Program

Revised

DESIGNATED SPECIAL EDUCATION PRIVATE SCHOOL is a **private school** that meets the following criteria:

1. The sole purpose of the **school** is to serve students with identified special needs, and all students who are enrolled in the **school** are diagnosed with a mild, moderate, or severe disability.
2. The educational programs provided to the students require modifications or adaptations to the Program of Study, and are specified in the **Individualized Program Plans (IPP)** developed and implemented for each student; and

For the 2003/2004 school year the following **schools** are in this category:

Calgary Society for Effective Education
- Calgary Academy

Calgary Quest School
Edmonton Academy
Elves Child Development Centre
Foothills Academy
Horizon School
Janus Academy
Parkland School
Renfrew Educational Services
Rundle College Academy
Integral Youth Counselling
- The Skills Factory

The Third Academy
- Calgary
- Lethbridge
- Red Deer

Revised

DEVELOPMENTALLY IMMATURE means an individual who is eligible to enter grade one (based on the school entrance age of the **school jurisdiction**) and less than 7 years old on September 1, who is enrolled in an **ECS program** because the parent, the **ECS operator** and the **school jurisdiction** agree that an **ECS program** is the most appropriate placement for the child. In this situation the individual is counted as a **child** for funding purposes. If the individual is in a program that involves both ECS and grade one instruction, he/she may be counted either as a **child** or as a **funded student** for funding purposes. A developmentally immature individual is not considered to have special needs and should not have been identified as having special needs in prior years. If the individual has special needs then the individual is counted as a **funded student** for funding purposes.

DISTANCE is a term used in Rural Transportation Block funding. **Distance** refers to the **eligible transportation distance** from where each **eligible passenger** resides to their **designated school** or **school** of choice, whichever is closest.

DIVISION means a school division or regional division established pursuant to the current *School Act* or any predecessor *School Act* or Ordinance *School Act*.

Revised ***EARLY CHILDHOOD SERVICES (ECS) OPERATOR*** for funding purposes means a **board** or a **private ECS operator** providing an approved **ECS Program**.

EARLY CHILDHOOD SERVICES (ECS) PROGRAM means an education program provided pursuant to Section 30 of the *School Act*.

EDUCATION SERVICES AGREEMENT means an agreement or a portion of an agreement entered into by a **school jurisdiction** under Section 62 of the *School Act* to educate students under its authority on a full-time basis. Examples of this would be tuition agreements, sponsorship agreements, and transportation agreements.

EFFECTIVE TRANSPORTATION AREA for the purposes of Rural Transportation Block funding means the total area in square miles in a **district** or **division** excluding:

- unpopulated Crown land, military reserves, grazing leases, provincial parks, and large bodies of water;
- townships where two or more adjacent townships have vacant land which is at least the size of a township;
- outlying townships within the jurisdiction boundary where the **school jurisdiction** provides no transportation service;
- city, town, village or hamlet with a population greater than 10,000; and
- the portion for transportation services provided by another **school jurisdiction** under a **transportation agreement**;

but including:

- any township in which a portion of the township is privately owned; and
- two square miles per mile of road corridor through vacant townships between populated areas.

ELIGIBLE PASSENGER for purposes of Student Transportation funding refers to an individual who is transported under Section 51 of the *School Act* and the *Student Transportation Regulation* or required to be transported to and from **school** under Section 51 of the *School Act* and the *Student Transportation Regulation* and is enrolled in a **school** of the board, as follows:

1. An aide accompanying a **student with a disability** or an **ECS child** in a program unit who is transported to and from **school**;

2. A **funded student** who:
    a) resides within the boundaries of a **school jurisdiction** and attends a **school** operated by that **board**; or

b) resides within the boundaries of a **school jurisdiction** and attends a **school** operated by another **board** with which the **school jurisdiction** has an **education services agreement** for that student; or

c) resides within the boundaries of another **school jurisdiction** with which the **board** has an existing **transportation agreement** for that individual or who has been admitted to a **school** operated by another **board** and is transported within the boundaries of that **board**; or

d) resides in **unorganized territory** and attends a **school** operated by a **board** adjacent to the **unorganized territory**; or

e) resides in **unorganized territory** and attends a **school** operated by a **board** or a **private school** with which the **school jurisdiction** adjacent to the **unorganized territory** has an existing **transportation agreement**; and

f) resides at least 2.4 kilometres (by the most direct route on a **highway**) from the **school** that the individual has been directed to attend pursuant to Section 45(2) of the *School Act*; or

g) resides at least 2.4 kilometres (by the most direct route on a **highway**) from the **school** at which the individual is attending a language program complying with Section 11 of the *School Act*; or

h) resides in **unorganized territory** at least 2.4 kilometres (by the most direct route on a **highway**) from the **school** that individual attends.

3. A **student with a disability** who requires transportation to and from **school**;

4. A student who is transported by horse drawn vehicle to the **school** which the student has been directed to attend; or

5. A **funded student** who resides within the boundaries of a **school jurisdiction** and attends a **private school** with which the **school jurisdiction** has an **education services agreement**.

ELIGIBLE STUDENT (for ASFF purposes as defined in the Alberta School Foundation Fund Regulation) means a student who:

Revised

1. On September 30, meets the requirements of Section 8 of the *School Act*;
2. Either has a **parent** who ordinarily resides in Alberta or is an **independent student** who ordinarily resides in Alberta;
3. Is enrolled in and is attending a **school** operated by a board;
4. Is at least 5 years 6 months but less than 20 years of age on September 1 of the year in which the student is counted;
5. Is not a student enrolled in a **home education program**;
6. Is not a **child** to whom an **early childhood services program** is being provided pursuant to Section 30(1)(a)(b) of the *School Act*; and
7. Is not an Indian residing on a reserve pursuant to the *Indian Act* (Canada).

ELIGIBLE TRANSPORTATION DISTANCE for the purposes of Rural Transportation Block funding means the **distance** each **eligible passenger** resides from his or her **designated school**. It is the one-way **distance** from the boundary at the roadway access to the residence nearest to the **school** of the quarter section or lot on which the residence of the **eligible passenger** is situated to the **designated school** in kilometres on a travelled road or public right of way on any part of which the public is ordinarily entitled or permitted to use for the passage of vehicles, but does not include privately owned laneways or roads. **Distances** that students are transported on private laneways or roads is **eligible transportation distance** only where the **eligible passenger** is wheelchair-bound, a **student with severe disabilities,** or a **child with severe disabilities**.

ELIGIBLE TRANSPORTED ECS CHILD is a **child** enrolled in an **ECS program** who resides at least 2.4 kilometres from the program in which the **child** is enrolled.

EXPECTED ELIGIBLE PASSENGER is a term used in Section 1.20 – Metro Urban Transportation Block and refers to the estimated number of **eligible passengers** calculated on the basis of enrolment and a number of factors which affect eligibility for transportation.

FIRST NATIONS STUDENT means an individual, usually residing on an Indian Reserve:

1. Who pursuant to the *Indian Act* (Canada) is registered as an Indian or is entitled to be registered as an Indian; and
2. For whom the educating **school jurisdiction** receives payment of a tuition fee from the band or band council which is provided by the Government of Canada in respect of that individual.

FRANCISATION means a program that assists students attending Francophone **schools** who do not have sufficient French language skills to succeed in **school**. **Francisation** programs are similar to ESL programs that assist students attending English-speaking **schools** who do not have sufficient English language skills to succeed in **school**.

New ***FRANCOPHONE REGIONAL AUTHORITY*** means a Regional Authority for a Region established by the Minister under section 255 of the *School Act*.

FRANCOPHONE EDUCATION PROGRAM means a program operated by a Francophone Regional authority under Section 10 of the *School Act*.

FRENCH AS A SECOND LANGUAGE (FSL) means a program or course offered under Section 39 of the *School Act*.

FRENCH FIRST LANGUAGE (FRANCOPHONE) EDUCATION means an education program offered under Section 10(1) of the *School Act* for individuals with rights under Section 23 of the *Canadian Charter of Rights and Freedoms* to receive **school** instruction in French.

FROZEN FUNDED STUDENT COUNT is a snapshot of the September 30 Funded Student Count as it stands on the last business day in May each year. This count includes Revised any add/change/deletes and cleared priority **school** conflicts that are processed by School Finance to the last business day in May each year.

Revised

FUNDED PRIVATE SCHOOL means an accredited private school as defined in Sec 28 (2) of the *School Act* that receives a grant under the *Learning Grants Regulation*.

FUNDED STUDENT means an individual who:

Revised

1. Is attending a **school** or a **blended program** in grades 1 to 12 on September 30 of the current **school** year;
   a) operated by a **school jurisdiction** or the governing body of a **funded private school**; or
   b) in another province operated by a board of trustees or similar governing body of a publicly funded school or separate board or a person with which the Alberta **school jurisdiction** has an agreement under Section 62 (1) or (2) of the *School Act* for the individual because he/she is a **resident student** of the **school jurisdiction** or a Charter section 23 student represented by a **francophone regional authority**; or
   c) operated by the Government of Canada or any agency of the Government of Canada or a council of a band as defined in the *Indian Act* (Canada) or any agency established by a council of a band or councils of bands with which the Alberta **school jurisdiction** has an agreement under Section 62(2)(b) or (c) of the *School Act* for the individual because he/she is a **resident student** of the **school jurisdiction**; or
   d) in another province or country under an **reciprocal exchange program** approved by Alberta Learning with a student from that respective province or country; and

Revised

2. Is at an age on September 1 in the school year in which he/she is counted, as follows;
   a) At least 5 years 6 months of age and is eligible to enter grade 1 according to the school entrance policy of the **school jurisdiction** that enrolls the student, but less than 20 years of age; or
   b) less than 5 years 6 months of age, is enrolled in grade 1, and has previously attended an Early Childhood Services (ECS) program outside of Alberta that meets the learner expectations of the Kindergarten Program Statement; or
   c) 6 years but less than 7 years of age and who has a mild, moderate or severe disability and requires another year of ECS; or
   d) 6 years but less than 7 years of age who is both **developmentally immature** and has special needs.

3. Is a Canadian citizen; or
   a) lawfully admitted to Canada for permanent residence;
   b) a child of a Canadian citizen; or
   c) a child of an individual who is lawfully admitted to Canada as a permanent or **temporary resident**; and

4. Has a parent who ordinarily resides in Alberta (*School Act*, Section 273), or is an independent student who ordinarily resides in Alberta; and

5. Is not counted for basic instruction funding by another **school jurisdiction**, a **funded private school** or an **ECS operator** under the Learning Grants Regulation; and

6. Is not a **First Nations student** enrolled in a **school** operated by a **school jurisdiction** or the governing body of a **funded private school**; and

7. Is not a **home education student**.

GROUP HOME means any home operated or approved by the government and includes a treatment (therapeutic and/or specialized foster care) foster home where there is more than one individual placed in the home. **Group homes** approved as **Institutions** must provide 24 hour supervision and intensive treatment/assessment for students in a specialized, secure setting. If the **Institution's** educational facility is not located on-site in the **group home**, transportation of students to and from **school** must be supervised by **group home** staff.

HIGHWAY means any thoroughfare, street, road, trail, avenue, parkway, driveway, pedway, lane, square, bridge, or other place, whether publicly or privately owned, any part of which the public is ordinarily entitled or permitted to use for the passage or parking of vehicles; and

1. Includes:
   a) a sidewalk (including the boulevard portion of the sidewalk); and
   b) if a **highway** right of way is contained between fences or between a fence and one side of the roadway, all the land between the fences, or all the land between the fence and the edge of the roadway, as the case may be.

HOME EDUCATION STUDENT means an individual who:

1. Meets the requirements of the *Home Education Regulation* (AR 126/99); and
2. Is under the supervision of a **school jurisdiction** or a **funded private school** and living in Alberta on September 30; and
3. Is 5 years and 6 months or greater, but less than 20 years of age on September 1 in the **school** year in which s/he is counted; and
4. Is a Canadian citizen; or
   a) lawfully admitted to Canada for permanent residence;
   b) a child of a Canadian citizen; or
   c) a child of an individual who is lawfully admitted to Canada for permanent or temporary residence; and
5. Has a **parent** who ordinarily resides in Alberta, or is an **independent student** who ordinarily resides in Alberta; and
6. Is not counted by another **school jurisdiction** or **funded private school** for basic instruction funding, or an **ECS operator** under the *Learning Grants Regulation*.

INDEPENDENT STUDENT means a student under Section 1(1)(m) of the *School Act* who is:

1. 18 years of age or older; or
2. 16 years of age or older; and:
   a) who is living independently; or,
   b) who is a party to an agreement under Section 8(2) of the *Child Welfare Act.*

Revised

INDIVIDUALIZED PROGRAM PLAN (IPP) means a concise plan of action that is designed to address the student's/**child's** special needs, and is based on diagnostic information that provides the basis for intervention strategies. An IPP is mandatory for all students/**children** identified with special needs, including mild, moderate, and severe disabilities, and the gifted and talented, require an IPP.

The IPPs of students/**children** with special educational needs will include:

1. Assessment and diagnostic data that identifies strengths and areas of need;
2. Specific accommodations and support services;
3. Measurable goals and objectives;
4. Evaluation procedures;
5. Review dates;
6. Placement/Programming information; and
7. Transition plans

Revised

IN-HOME PROGRAM means an **Early Childhood Services (ECS) program** delivered to a **child with a disability** on a one-on-one basis through home visits in the **child's** home or other alternate setting by a teacher, teacher assistant and/or **child** development specialist. A primary purpose of an **in-home program** is to actively involve **parents** and/or caregivers (with the educational team) in the development and delivery of a comprehensive educational program for the **child**. For program and funding purposes, an eligible home visit must meet the following requirements:

- All home visits must be under the supervision of the **child's** teacher;
- A home visit must involve the **child** and the **parent**/guardian or alternate caregiver;
- A home visit must average at least 1.5 hours in length; and
- Visits to the home by a developmental specialist need to support the **child's** overall educational program in order to count as an eligible home visit.

The number, setting, and structure of home visits must be determined in consultation with the **parents** prior to implementation of the program. Some visits to alternate caregivers can be included as a part of the home program with the **parent's** agreement. Summary reports of visits to alternate caregivers must be shared with the **parent** either in written or verbal form. All home visits should be carefully planned and documented.

IN THE CUSTODY OF A DIRECTOR under the *Child Welfare Act* means a student who is in custody by agreement, or in temporary custody, or in permanent custody. This may also include students in Handicapped Children's Service Agreements where custody is part of the agreement.

Revised ***INSTITUTION*** means any secure residence prescribed by the Minister of Learning as an institution and operated or approved by the Government where staff are paid a salary to provide lodging and care on a 24 hour basis for the individuals in residence, and which is not currently provided for under the terms and conditions of foster **parent** agreements within the Province of Alberta. **Resident students of the government** attend the **school** program on site or in a facility for which the government department controlling the **institution** is legally responsible. **Resident students of the government** who reside in an **institution** have been placed there:

1. Through hospital admission; or
2. Through a court order or agreement under the *Child Welfare Act*; or
3. For protection and/or care by:
   a) Alberta Children's Services ;
   b) Alberta Health and Wellness; or
   c) Alberta Justice and Attorney General; or
4. As residents of a women's shelter because of a situation where there is need for protection from physical, psychological or sexual abuse.

Funded students in an **institution** must be **resident students of the government** as defined in Section 44 (7) of the *School Act*.

Revised

SCHOOL AUTHORITIES APPROVED TO PROVIDE AN EDUCATIONAL PROGRAM IN AN INSTITUTION (School Code)

- **Battle River RD No. 31**
  - Camrose Women's Shelter (4554)
- **Bosco Homes A Society for Children and Adolescents**
  - Columbus Academy (0577)
  - Don Bosco Academy (3398)
  - Phoenix Academy (0028)
  - Thomas More Academy (0483)
- **Calgary School District No. 19**
  - Women's Emergency Shelter
  - Dr. Gordon Townsend (9886)
  - William Roper Hull School (9033)
  - Westview YOC & Enviros (9687)
- **Chinook's Edge School Division**
  - Grimmon House (1058)
- **Edmonton School District No. 7**
  - CASA House (7713)
  - Glenrose Hospital (7701)
  - Highwood (Alberta Hospital) (7701)
  - Howard House (7713)
  - Kennedale YOC (7706)
  - Kochee Mena (7713)
  - Rite Trak (McMan) (7713)
  - Rosecrest (7729)
  - Royal Alexandra Hospital (7701)
  - University of Alberta Hospital (7701)
  - WIN House (7169)
  - Yellowhead Youth Centre (7713)
- **Elk Island PSD No. 14**
  - A Safe Place (3343)
- **Foothills SD No. 38**
  - Stampede Boys Ranch (5391)
- **Fort McMurray Catholic**
  - Youth Treatment Centre
- **Grande Prairie SD No. 2357**
  - Grande Prairie YOC (Bear Creek School) (1148)
- **Holy Family CSRD No. 37**
  - Francis Holistic Learning Centre (YAC) (1619)
- **Lakeland RCSSD No. 150**
  - Dr. Margaret Savage Crisis Centre (2916)
- **Lethbridge SD No. 51**
  - Pitawani (6456)
  - PCHIP/Secure Program
  - Harbour House (6459)
  - Hospital Program (6453)
  - Coulee Ridge YOC (6487)
- **Medicine Hat SD No. 76**
  - Med Hat PAS Hosp (6864)
  - Medicine Hat Bridge St. Remand Centre (6861)
- **Northern Lights SD No. 69**
  - Lac La Biche YAC (2716)
- **Parkland School Division**
  - Bright Bank Academy
- **Peace Wapiti School Div No. 33**
  - Rycroft School (1304)
  - Clairmont Group Home (1056)
- **Red Deer School Dist No. 104**
  - Parkland Youth Homes (4464)
  - Red Deer Hospital Program (0574)
  - Oskayak Treatment Centre (4469)
  - Direwood Treatment Centre (4461)
  - Red Deer Remand Centre (4467)
  - Red Deer Youth Assessment Centre (4457)
- **Sturgeon SD No. 24**
  - Oak Hill Boys Ranch (2509)
- **St. Paul Education RD No. 1**
  - Poundmaker's (2807)
- **Wetaskiwin Reg. Div. No. 11**
  - Wetaskiwin Plus (A+) Program (3143)
- **Wild Rose School Division No. 66**
  - Kootenay School (4111)
- **Wolf Creek RD No. 72**
  - Alberta Hospital Ponoka (4299)
  - Twin Oaks

MINISTER means the Minister of Learning.

ON-LINE PROGRAM is a program offered by a **school** delivered electronically at a **school** site or off-campus, under the instruction and complete supervision of a certificated teacher of a **board** or accredited **private school**. For full student funding, elementary and junior high students must have access to 950 hours of instruction and senior high students must have access to 1000 hours of instruction.

OPERATING DAY is used in conjunction with rural transportation and means a day in a **school** year during which the **schools** of a **school jurisdiction** are scheduled to be open for classroom instruction.

OTHER LANGUAGE IMMERSION PROGRAMS means a minimum of 25 percent of the instructional time to a maximum of 50 percent of instructional time uses a language other than French or English as the language of instruction. This includes all grade levels.

OUTREACH PROGRAM means a program offered by a **school** which provides a basic education developed for **funded students** who are unable to attend or benefit from a regular **school** program. The requirements of the program are detailed in the Outreach Program Policy 1.1.4.

1. An **outreach program** must be offered in a stand-alone facility.
2. **Home education students** are not eligible for outreach funding, and are not reported as part of the **outreach program**.

PARENT means, with respect to a student, the relevant individual under section 1(2) of the *School Act* unless otherwise specified.

PRIVATE EARLY CHILDHOOD SERVICES (ECS) OPERATOR means a society registered under the *Societies Act*, a non-profit company registered under Part 9 of the *Companies Act*, or a non-profit corporation incorporated by, or under, an act of the Legislature, or a **funded private school**; that Revised

1. Has been approved by Alberta Learning to operate an **ECS program**; and
2. Receives funding under the *Learning Grants Regulation* for the program.

PRIVATE SCHOOL means a **school** registered under Section 28 of the *School Act*.

PUBLIC TRANSIT SYSTEM refers to a bus or light rail system owned, operated or contracted by a city, town, village or hamlet which offers service to the public within its boundaries. Taxis and/or bussing systems designed for disabled individuals are not considered public transit.

RECIPROCAL EXCHANGE PROGRAM means a recognized program under which a student who is an Alberta **resident student** is partnered or paired with a student who is a resident of another province or country. The exchange occurs in the same **school jurisdiction** in the same **school** year, or the subsequent year.

RESIDENT BOARD means the **board** of the district or **division** of which a student is a **resident student**.

RESIDENT STUDENT means an individual who is entitled to have access to an education program under Section 8 and who is a **resident student** as determined under Section 44 of the *School Act*.

RESIDENT STUDENT OF THE GOVERNMENT means a student as defined in Section 44(7) of the *School Act* who is entitled to have access to an education program.

ROUTE DISTANCE is a term used in conjunction with rural transportation and means:

1. The **distance** from the point of the first morning pick-up by regular routing to the point of the last morning drop-off and back to the point of the first morning pick-up by the shortest or most direct route;
2. The **distance** from the point of the first afternoon pick-up by regular routing to the point of the last afternoon drop-off and back to the point of the first afternoon pick-up by the shortest or most direct route; and
3. The **distance** travelled on a **highway** by a vehicle transporting **eligible passengers** to and from **school**, or on a feeder route, on an **operating day** or by a vehicle transporting **eligible passengers** on a weekend between their places of residence and their boarding places or **schools** where both places are in the same district or **division**.

RURAL DISTRICT means a district or **division** that is not an **urban district**.

SCHOOL means a structured learning environment through which an education program is offered to a student by:

1. A **board**;
2. An operator of a **private school**;
3. An **Early Childhood Services (ECS) private operator**;
4. A **parent** giving a home education program; or
5. The **Minister**.

Revised

SCHOOL AUTHORITIES for the purpose of this manual includes **School Jurisdictions, Funded Private Schools**, and **Private ECS Operators**.

SCHOOL BUILDING means a building used for the instruction or accommodation of students that is owned or occupied by a **school jurisdiction**, a **school jurisdiction** and a municipality, or a **school jurisdiction** and another person.

SCHOOL BUS means a motor vehicle that:

1. Is owned, leased or contracted by a **school authority**;
2. Is used for the transportation of **eligible passengers**;
3. Has a passenger **seating capacity** of 12 or more; and
4. Is without exemption a Type I, Type II, Type III or Type IV **school bus** as described in the CSA Standard D 250-M 2001 as amended or replaced from time to time as issued by the Canadian Standards Association.

Revised

SCHOOL JURISDICTION means an Alberta school district, school Division, regional division, Francophone Regional Authority, **charter school**, the Lloydminster Public School Division, or the Lloydminster Roman Catholic Separate School Division.

New

STUDENTS/ECS CHILDREN WITH SEVERE DISABILITIES means **funded students** and ECS **children** who have been assessed as having a severe disability according to the definitions below:

CATEGORIES AND DEFINITIONS OF SEVERE DISABILITIES FOR ECS TO GR. 12

SEVERE COGNITIVE DISABILITY (Code 41)

A student/ECS **child** with a severe cognitive disability is one who:

a) has severe delays in all or most areas of development.
b) frequently has other disabilities including physical, sensory, medical and/or behavioural.
c) requires constant assistance and/or supervision in all areas of functioning including daily living skills and may require assistive technology.
d) should have a standardized assessment, which indicates functioning in the severe to profound range (standardized score of 30 ± 5 or less). Functional assessments by a qualified professional will also be considered in cases where the disabilities of the student/ECS **child** preclude standard assessments; and
e) has scores equivalent to the severe to profound levels on an adaptive behavioural scale (e.g., AAMR Adaptive Behaviour Scales-School: Second Edition (ABS-S:2); Vineland Adaptive Behaviour Scales; Scales of Independent Behaviour - Revised).

Revised

SEVERE EMOTIONAL/BEHAVIOURAL DISABILITY (Code 42)

A student/ECS **child** with a severe emotional/behavioural disorder is one who:

a) displays chronic, extreme and pervasive behaviours which require close and constant adult supervision, high levels of structure, and other intensive support services in order to function in an educational setting. The behaviours significantly interfere with both the learning and safety of the student/ECS **child** and other students/ECS **children**. For example, the student/**child** could be dangerously aggressive and destructive (to self and/or others), violent and/or extremely compulsive; and

b) (for grade 1-12 students) has a diagnosis including conduct disorder, schizophrenia or bi-polar disorder, obsessive/compulsive disorders, or severe chronic clinical depression; and may display self-stimulation or self-injurious behaviour. In the most extreme and pervasive instances, severe Oppositional Defiant Disorder may qualify; or

c) (for ECS **children**) has either a diagnosis or a statement by a qualified professional indicating that the **child** experiences severe behavioural difficulties.

A clinical diagnosis within the last 2 years of a severe emotional/behavioural disorder by a psychiatrist, chartered psychologist or a developmental pediatrician is required, in addition to extensive documentation of the nature, frequency and severity of the disorder by **school authorities**. In the case of an ECS **child** who is not currently placed in an educational environment, extensive documentation of the nature, frequency, and severity of the disorder by the referring specialist may suffice. The effects of the disability on the student's/ECS **child's** functioning in an education setting should be described. An ongoing treatment plan/behaviour plan should be available and efforts should be made to ensure that the student/ECS **child** has access to appropriate mental health and therapeutic services.

A clinical diagnosis of a severe emotional/behavioural disorder is not necessarily sufficient to qualify under this category. Some diagnoses with behavioural components that are not sufficient to qualify are: Attention-Deficit/Hyperactivity Disorder (AD/HD), Attention Deficit Disorder (ADD).

Note: Students/ECS **children** diagnosed with Fetal Alcohol Spectrum Disorder (FASD) in the most severe cases should be reported under Code 44 rather than Code 42.

Revised

SEVERE MULTIPLE DISABILITY (Code 43)

A student/ECS **child** with multiple disabilities is one who:

a) has two or more non-associated moderate to severe cognitive and/or physical disabilities which, in combination, result in the student functioning at a severe to profound level; and
b) requires significant special programs, resources and/or therapeutic services.

Students/ECS **children** with a severe disability and another associated disability should be identified under the category of the primary severe disability. For example:

- A student/ECS **child** with a severe cognitive disability and another associated disability is not designated under this category, but is designated under severe cognitive disability.
- A student/ECS **child** with a severe emotional/behavioural disability and another associated disability is not designated under this category, but is designated under severe emotional/ behavioural disability.

The following mild or moderate disabilities cannot be used in combination with other disabilities to qualify under Code 43:

a) Attention Deficit / Hyperactivity Disorder (AD/HD) (ECS – gr. 12)
b) Emotional/Behavioural Disabilities (ECS – gr. 12)
c) Learning Disability (LD) (grades 1 – 12 only)
d) Speech and Language Related Disabilities (grades 1 – 12 only)

NOTE: ECS **children** diagnosed with Down Syndrome in the most severe cases should be reported under Severe Multiple Disability (Code 43)

SEVERE PHYSICAL OR MEDICAL DISABILITY - including Autism (Code 44)

A student/ECS child with a severe physical, medical or neurological disability is one who:

a) has a medical diagnosis of a physical disability, specific neurological disorder or medical condition which creates a significant impact on the student's/ECS **child's** ability to function in the **school** environment (note: some physical or medical disabilities have little or no impact upon the student's/ECS **child's** ability to function in the **school** environment); and
b) requires extensive adult assistance and modifications to the learning environment in order to benefit from schooling.

A student/ECS **child** with severe autism or other severe Pervasive Developmental Disorder is included in this category. A clinical diagnosis by a psychiatrist, chartered psychologist, or medical professional specializing in the field of autism is required. A clinical diagnosis of autism is not necessarily sufficient to qualify under this category. Eligibility is determined by the functioning level of the student/ECS **child** with autism.

In order for a diagnosis of autism to be made, the student/ECS **child** needs to demonstrate impairment in the following areas:

- Social interaction; and
- Communication; and
- Stereotyped pattern of behaviour (i.e. hand flapping, body rocking, echolalia, insistence on sameness and resistance to change).

A student/ECS **child** diagnosed with severe Fetal Alcohol Spectrum Disorder (FASD) may have Fetal Alcohol Syndrome (FAS) or Alcohol-Related Neurodevelopmental Disorder (ARND) and is included in this category (Code 44 – Severe Physical or Medical Disability – Including Autism). A clinical diagnosis by a psychiatrist, chartered psychologist with specialized training, or medical professional specializing in developmental disorders is required. A clinical diagnosis of FASD is not necessarily sufficient to qualify under this category. Eligibility is determined by the functioning level of the student with FASD. Students/ECS **children** with severe FASD who exhibit significant impairment in the areas of social functioning, life skills, behaviour, learning, attention and concentration, will need extensive intervention and support.

DEAFNESS (Code 45)

A student/ECS **child** with a profound hearing loss is one who:

a) has a hearing loss of 71 decibels (dB) or more unaided in the better ear over the normal speech range (500 and 4000 hertz (Hz)) which interferes with the use of oral language as the primary form of communication, or has a cochlear implant preceded by a 71 dB hearing loss unaided in the better ear; and

b) requires extensive modifications and specialized educational supports; and
c) has a diagnosis by a clinical or educational audiologist. New approvals require an audiogram within the past 3 years.

If a student/ECS **child** has a severe to profound sensori-neural hearing loss that has not changed significantly since the initial approval by Alberta Learning, documentation from a qualified specialist in the field of deafness outlining the severity of the hearing loss and modifications to the learning environment may be sufficient to support eligibility.

BLINDNESS (Code 46)

A student/ECS **child** with severe vision impairment is one who:

a) has corrected vision so limited that it is inadequate for most or all instructional situations, and information must be presented through other means; and
b) has a visual acuity ranging from 6/60 (20/200) in the better eye after correction, to having no usable vision or field of vision reduced to an angle of 20 degrees.

If a student/ECS **child** has a severe to profound visual impairment that has not changed significantly since the initial approval by Alberta Learning, documentation from a qualified specialist in the field of vision outlining the severity of the disability and modifications to the learning environment may be sufficient to support eligibility.

For those students/ECS **children** who may be difficult to assess (e.g. cortical blindness – developmentally delayed), a functional visual assessment by a qualified specialist in the field of vision or a medical professional may be sufficient to support eligibility.

Revised

SEVERE COMMUNICATION DISORDER (Code 47) - For ECS **children** only.

A **child** with a severe communication disorder has severe difficulty in communicating with peers and/or adults because of a severe disorder in expressive and/or receptive language and/or total language. This typically includes little, if any, expressive or receptive communication skills.

Children who experience a severe communication disorder, as defined here, and have sufficient communicative ability to permit formal speech/language assessment should demonstrate results less than or equal to the first percentile in expressive and/or receptive language and/or total language. Parental report and/or observational measures in conjunction with a description of the child's communication ability may be used if formal language assessment is not possible. These results should indicate that the child has very limited communication skills, or has an age equivalent on receptive and/or expressive language equal to or less than one half the child's chronological age. Results that are at or below the first percentile, on individual components of language (i.e. sentence structure, word structure, sentence recall, etc.) do not meet Alberta Learning criteria for a severe communication disorder.

Children whose primary language disorder is in the area of phonology are considered to meet criteria for Severe Communication disorder under the following conditions:

- A current speech/language assessment identifies the severity of the **child's** phonological delay as falling in the severe to profound range.
- The phonological delay is accompanied by delays in the **child's** receptive and/or expressive language.
- The phonological delay significantly impacts the **child's** intelligibility.
- The impact of the **child's** total language difficulties is such that extensive supports and services are required in order for the **child** to function within an ECS setting.
- A phonological delay significantly impacts the **child's** acquisition of early literacy, language concepts and/or social use of language and therefore must be addressed through the educational component of the **child's** program (**IPP**).

A speech-language assessment report completed within six months prior to the day the **child** begins his/her program must be submitted with the PUF application.

To facilitate communication skills, these **children** may benefit from small group work or clustering with peers of the same age, and a 475 hour program may be sufficient.

If a **child** has a moderate to severe disability in a non-associated category (in addition to having a moderate to severe communication disorder), then the **child** would be more appropriately identified as Severe Multiple Disability (Code 43). This only applies for eligible ECS **children** and does not apply for students in grades 1 to 12.

New ***STUDENT WITH A DISABILITY*** means a **funded student** who has been assessed and coded as having a mild, moderate or severe disability.

Revised ***STUDENT WITH SPECIAL NEEDS*** means a student who requires an adapted or modified educational program to meet his or her exceptional needs. The **Individualized Program Plan (IPP)** provides documentation of the program and is a mandatory requirement for any student identified as a special needs student. This includes students with a mild, moderate or severe disability and students who are gifted and talented.

SUPERVISING BOARD means the **resident board** or the willing non-resident board providing supervision of the home education program.

TEMPORARY RESIDENT, for purposes related to the interpretation of the *School Act*, is defined as a person who:

a) has been issued a study permit and is registered in a full-time, full-year program (i.e., a foreign student who is registered full-time in a recognized post-secondary program in Alberta for one year or more); or
b) has been issued an employment authorization to work temporarily in Canada (i.e., a temporary foreign worker); or
c) has filed a refugee claim to the Immigration and Refugee Board (IRB) within the past year (i.e., a refugee claimant);or
d) has been issued a federal Minister's Permit; or

e) has diplomatic status in Canada.

Temporary residents will not include:

a) visitors/tourists to Canada, with or without a valid visitor's visa;
b) individuals in Canada with student authorizations who are not registered in a full-time, full-year program; and
c) individuals in Canada for three months or less for the purposes of language training.

A **child** whose **parent(s)** fit the definition of a **temporary resident**, as it relates to the *School Act*, is eligible to access basic education and the **parent** can not be required to pay foreign student tuition fees. In all other cases the **parent** may be required to pay foreign student fees at the discretion of the school **board.** Students of **school** age who are in Canada on a study permit are considered Foreign Students and do not qualify for Alberta Learning funding.

See also definition of **Funded Student** (glossary) and Section 8 of the *School Act.*

TRANSPORTATION AGREEMENT means an agreement or a portion of an agreement entered into by a **school jurisdiction** under Section 62 of the *School Act* to transport students under its authority to a **school**.

UNORGANIZED TERRITORY means any area in Alberta that is not included within a district, a **division**, or a regional **division**.

URBAN DISTRICT means:

1. A city district which is not included in a **school division** or regional **division**; and
2. A district, **division** or regional **division**, or portion thereof, designated by the **Minister** as an **urban district**.

WEIGHTING FACTOR is a term used in conjunction with rural transportation and means, for the purposes of Block Funding, that:

1. Each **eligible passenger** in ECS and grades 1 to 6 is multiplied by a factor of 1.0;
2. Each **eligible passenger** in grades 7 to 12, is multiplied by a factor of 1.50;
3. Each **eligible passenger** in grades 1 to 12 registered as a Code 41, 42, 43, 44 or 46 student, is multiplied by a factor of 3.0;
4. An aide accompanying a **student/child with a severe disability** is multiplied by a factor of 1.50; and Revised
5. Each **eligible passenger** who requires a wheelchair is multiplied by 6.0.

RECESSING OR CEASING OF OPERATIONS BY A PRIVATE ECS OPERATOR

POLICY

When funding has been provided by Alberta Learning and the funding has not been used for the purpose for which the grant funds were provided, the surplus money shall be returned to the Provincial Treasurer or provided to another operator of an approved **Early Childhood Services (ECS) program**.

GUIDELINES

1. An ECS operator may choose to go into recess for not more than one year before making a final decision on ceasing or resuming operations.

2. The final decision to cease operations must have been reached by the members of the society governing the **ECS** operations, at a general meeting called within the provision of the society's by-laws. This decision should be communicated to the respective Zone Services Branch as soon as possible.

3. If an ECS operator decides not to continue providing a program, the operator may determine if another **ECS** operator in the community is willing to take over the program. An **ECS** program must be operated by the new operator.

   If another operator in the community agrees to take over the program and to accept the transfer of assets, liabilities, including any operating and capital surpluses, that new operator must acknowledge receipt of this transfer and agree not to claim a capital grant. Written acknowledgement of an agreement to these terms must be sent to School Finance, Alberta Learning.

4. If an **ECS** operator does not transfer its assets to another operator, Alberta Learning will determine the amount of surplus from operations to be returned to the Provincial Treasurer. In addition, if a capital grant has been obtained within the final three years of operation, a portion of this grant must be returned.

PROCEDURES

1. Sign an agreement/contract for the transfer of the **ECS** operator's assets and liabilities to another operator. A letter of agreement signed by both parties is sufficient.

2. Prepare an Audited Financial Statement (AFS) for the final year of operation or portion thereof and submit this statement to Alberta Learning.

3. Prepare an inventory schedule of assets transferred on the date operation ceased and have it signed by officials of the **ECS** operator accepting the transfer.

4. Notify Alberta Government Services, Corporate Registry if the society will be dissolved on the specified date.

5. In the year an operator decided to cease operations, fees paid by **parents** in that year may be returned to the **parents** from the operating surplus of that year.

6. When the **ECS** operator ceases operation but does not transfer the assets and liabilities to another operator, the final AFS will be reviewed and the accumulated surplus, if any, will be pro-rated by Alberta Learning. The portion of the surplus to be returned to Alberta Learning will be calculated on the ratio of Alberta Learning's contribution to the total revenue of the **ECS** program over the final three years of operation.

7. The disposition of the operating surplus and capital assets not returned to Alberta Learning should be authorized at a meeting of the society members.

13 (1) A **Minister** may make grants if

(a) he is authorized to do so by regulations under this section, and

(b) there is authority available in a supply vote for the purpose for which the grant is to be made.

(2) The Lieutenant Governor in Council may make regulations applicable to a **Minister**

(a) authorizing the **Minister** to make grants;

(b) respecting the purposes for which grants may be made;

(c) governing applications for grants;

(d) respecting the persons or organizations or classes of persons or organizations eligible for grants;

(e) respecting the conditions required to be met by any applicant for a grant to render that person or organization eligible for the grant;

(f) empowering the **Minister** in particular circumstances to waive eligibility criteria prescribed under clause (d) or (e);

(g) respecting the conditions on which a grant is made and requiring the repayment of the grant to the Government if the conditions are not met;

(h) providing for the payment of a grant in a lump sum or by instalments and prescribing the time or times when the lump sum or the instalments may be paid;

(i) authorizing the **Minister** to make deductions from a grant and prescribing the circumstances under which the deductions may be made;

(j) limiting the amount of a grant or class of grant;

(k) authorizing the **Minister** to delegate in writing to any employee of the Government any power conferred or duty imposed on him by this section or the regulations;

(l) requiring a person or organization receiving a grant to account for the way in which the grant is spent in whole or in part;

(m) authorizing the **Minister** to enter into an agreement with respect to any matter relating to the payment of a grant.

(3) A regulation made under subsection (2) may be specific or general in its application.

(4) Despite subsection (2)(g), the **Minister** may impose further conditions not prescribed in the regulations on the making of a particular grant.

WITHDRAWAL OF TEACHER SERVICES OR LOCKOUT

BACKGROUND

Alberta Learning recognizes the desire of a school **board** and its teachers to negotiate contractual arrangements that are acceptable to both parties. In the event that negotiations break down and a strike by teachers or a lockout by a **board** occurs, Alberta Learning will adjust funding while keeping the educational needs of the students a priority.

PURPOSE

In the event of a strike by staff or a lockout by a **board** when educational services are not provided, the funding payable to a **board** shall be reduced. Adjustment of funds prevents a financial benefit from accruing to a **board**.

CONDITIONS

1. The **Minister** may reduce funding provided under the Alberta School Foundation Fund and/or the General Revenue Fund for the period for which cessation of services occurred.

2. Funding will be reduced by 1/200th of the certificated teacher salary and benefits amount for each day teachers are on strike.

3. The amount of the reduction will be based on the following:

   a) A 200 day school year where funding is payable based on an annual formula

   b) The number of **operating days**, (including teaching preparation days and in-service days) for which the strike or lockout occurred. Scheduled holidays, statutory holidays and make-up time for teaching days lost will not be used to reduce the number of **operating days**.

4. **Boards** are required to ensure that students in Grades 2 to 9 have access to 950 hours of instruction per year and that students in Grades 10 to 12 have access to 1,000 hours of instruction per year. The access to instruction hours can be met in various ways.

5. All other funding to **school jurisdictions** will continue in order to provide **boards** with the flexibility to make local operating decisions.

6. There should be sufficient funds and flexibility within a **board's** current funding allocation to cover any cost of providing distance learning materials to students during the cessation. No additional funding will be provided for these costs.

7. A **board** shall notify Alberta Learning, immediately following the end of a strike or lockout, of the period and number of days of the cessation of services.

8. In the event that a strike by teachers or a lockout by a **board** occurs on the **count date**, an alternate **count date** will be determined by the Director of School Finance.

9. Alberta Learning will provide the **board** with a detailed calculation of the funding reduction.

10. After the strike or lockout, the funding reduction amount will be recovered from the next applicable payment(s) to the **board**.

11. In the event of a dispute over the amount of the funding reduction, a **board** may submit its concern(s) in writing to the **Minister**.